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Thomas E. Morris
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A Formative Evaluation of the Program and Budget Review Process
of the United Way of Windsor-Essex County

by

THOMAS E. MORRIS

A thesis
submitted to the
faculty of Graduate Studies and Research
through the School of Social Work
in Partial Fulfillment of the requirements for the
Degree of Master of Social Work at the
University of Windsor

Windsor , Ontario, 1985

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ABSTRACT

An Evaluation of the Program and Budget Review Process Of The United Way of Windsor-Essex County

by

Thomas Edward Morris

This research project addresses the issues and concerns associated with the processes utilized by a voluntary sector human service organization in its attempt to be accountable to the community for the utilization of donated funds.

The purpose of this study is to investigate the process used by the United Way of Windsor-Essex County's Allocations Committee (formerly the Program and Budget Review Committee). This Committee utilizes community volunteers to review and evaluate the programs and special projects which it sponsors. The study was designed to provide information about:

1. the effectiveness of the recruitment process of the Allocations Committee;

2. attitudes of panel members concerning the effectiveness of the orientation and training process used in preparing Allocations Committee volunteer panel members;
3. attitudes of panel members concerning the effectiveness of various structural characteristics of the program and budget review process;

A review of the literature was conducted to gain greater understanding of the field of voluntary activity, fiscal accountability of voluntary organizations, recruitment of volunteers and their training. The population for this study is the total membership of the volunteers who participated in the review process during 1983, 1984 and 1985. Information was obtained from eighty respondents, through a questionnaire.

The findings indicate that the effectiveness of the evaluative structure utilized to conduct agency reviews is strongly influenced by the recruitment processes and structural aspects (time allotment) of the evaluation methodology.

A discussion of the findings and recommendations were made to the United Way of Windsor-Essex County, and to those interested in conducting further research in this area.

DEDICATION

To. Theresa

"There's no free gate to anything worthwhile,
not to skill nor health, nor to
success nor friendship, nor even to the lasting
love and respect of those who are nearest
and dearest to us.

These are the items that make up the best
income that any human being can have.
and the sum of that income will be measured
by the sum of what we are willing to pay
to get it"

Jordan, 1980

Love always,

Thom

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Gratitude also goes to my family, near and far, who provided encouragement and support when they were needed.

Finally to his wife Theresa, whose patience and support eased the burden which accompanied this endeavour, words alone cannot express my gratitude.

Thomas Edward Morris

Windsor, Ontario

August 20, 1985

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Chapter I

INTRODUCTION

Philanthropic volunteerism in the private human services has long been a tradition of distinction and integrity in the North American culture. Over the years however, this form of pluralistic involvement has matured from relatively informal groups of citizens banding together to address a common cause, to highly structured, multi-million dollar organizations. These voluntary organizations address numerous social, political, and economic problems in various fields of service which encompasses both micro and macro social systems.

In Canada, voluntary sector action has probably provided the catalyst for the development of social services and organizations. These private services and organizations initially represented the exclusive response to the social needs of the communities. Presently however, these services provide important supplementation to the majority of provincially and federally sponsored services and programs and, in relation to certain populations, represent the primary source of social service response (Rossides, 1966).

The United Way represents one of Canada's largest private sector organizations and exists in most, if not all, metropolitan communities. Each local organization attempts to respond to the needs of its particular community through fund raising campaigns to support programs and projects which respond to a wide variety of local human needs. With

this mission in mind, these organizations must assume responsibility for demonstrating accountability in terms of appropriate utilization of community funds.

This concept of accountability in the delivery of human services has long been a concern in the operation of both public and private human service organizations. In the past decade however, a growing difficulty of allocating resources, and the numerous options for spending those which are available, have prompted demands by contributors for increased justification and accountability of expenditures. It was in response to this demand that the concept of program and budget review, involving community volunteers to act on behalf of contributors, was developed and has become a significant component of many United Way organizations.

PURPOSE

This research project addresses the issues and concerns associated with the processes utilized by voluntary sector human service organizations in their attempts to be accountable to the community for provision of services and expenditure of funds.

From a broad perspective, the purpose of this research project is to explore various factors relating to the establishment of accountability measures in voluntary sector organizations. More specifically, the purpose of this research study is to investigate the process used by the United Way of Windsor-Essex County, Allocations Committee, which utilizes community volunteers to review and evaluate the programs of its member agencies and to allocate the funds to those agencies.

The primary concern of this study is to establish whether the Program and budget review process is utilizing an effective means of achieving its proposed objectives.

This project will attempt to provide information about:

1. the effectiveness of the recruitment process of the Allocations Committee volunteer panel;
2. attitudes of panel members concerning the effectiveness of the orientation and training process used in preparing Allocations Committee volunteer panel members;
3. attitudes of panel members concerning the effectiveness of various structural characteristics of the program and budget review process;

The investigator's initial interest in this particular study arose out of his interest in social work research, particularly in the area of program evaluation. Subsequent discussion of this study's parameters with the United Way of Windsor-Essex County, Allocations Committee, provided further enticement and interest in the study-topic by identifying its possible practical application and by exploring a number of the concerns that committee members had, pertaining to the program and budget review process.

Through exploration of the literature, it was observed that there was a growing concern for the establishment of adequate accountability measures in private, nonprofit, human service delivery organizations. It is from this concern, as well as from the interest displayed for the development of this study by the Allocations Committee of United Way of Windsor-Essex County, that the incentive for the development of this project was provided.

The following chapter will provide a review of literature that is considered relevant to this study. Subsequent chapters discuss the

setting of the study (United Way of Windsor-Essex County) with particular attention being given to the program and budget review process, the methodological approach utilized in this project, an analysis of the data collected, and finally, a discussion of the research findings with recommendations and conclusions derived from the analysis of data.

Chapter II

REVIEW OF LITERATURE

Relative to the purpose of this study, as stated in chapter one, a systematic review of the literature was conducted by the researcher. This review process sought to ground the study both theoretically and historically.

To establish this background, it is important to address several factors which have influenced the development and present status of the role of the volunteer in the private sector, and in particular, the utilization of community volunteerism in the United Way of Windsor-Essex County. These factors include: citizen participation and its progression in Canadian societies; the development of citizen participation in the form of philanthropic or voluntary action; the utilization of citizen participation as a form of societal or community accountability (community-based citizen review panels); and finally, the recruitment and training of volunteers in the private sector.

CITIZEN PARTICIPATION AND ITS PROGRESSION IN CANADA

Rossides (1966), explored the history of citizen participation and found that it originated as a social ideal in early Greek civilizations. He noted:

For the Greek, the individual existed only in a social context. Anyone who could live without the sustained stimulation of a coherent social life was, in Aristotle's famous phrase, "either a beast or a god". Though only imperfectly realized by the Greeks, the idea that society is

to be judged by the quality of the participation that it offers: its members emerged to form a main ingredient of Western culture. (Rossides, 1966, p.1)

The concept of citizen participation or involvement has been the keynote in both the pluralistic and democratic features of North American life today. Pluralistic in that citizen involvement, in theory, is not restricted to the "chosen few", and democratic, in that all persons are considered equal, and therefore have the right to participate. Draper (1971) suggests that:

The term "citizens' participation and involvement" seems almost superfluous in a democratic society. It could be argued that democracy is by nature participatory, and that the citizen is a source of all political power (p. 14).

North American history appears to have conceived two directions of citizen involvement during its development. The initial, most widespread aspect of citizen participation has been in the political-legal forum with the development of voting and jury systems. Not long after however, the initiation of philanthropic societies and groups provided citizens with an alternative, less restricted form of participation for addressing societal needs (Draper, 1971).

These two avenues have gone through rapid and dramatic changes over the years. Although they have matured in terms of administrative and technological sophistication, the primary direction of citizen involvement has largely changed in nature from public altruism to private self interest. In the early settlement years, community members felt a sense of duty to contribute time, effort, and goods for the benefit of the community during its development. As the industrialization of the nineteenth century advanced, the feeling of collective perpetuation was slowly replaced by individual and family unit survival (Hafley & Cull, 1973).

This change has resulted largely as a response of necessity by economically and socially deprived populations and has progressed into a vast network of private advocacy groups (Draper, 1971). These groups range in size and scope from local neighbourhood groups to nationally focused private sector social service organizations.

The following sections will discuss the development of philanthropic and political-legal forms of citizen participation, their applications in contemporary Canadian societies, and the utilization of these involvements within the network of private advocacy groups.

Volunteerism And Voluntary Action In Canada

Voluntary action may be found throughout the world but only in contemporary western societies has there been such an overall institutionalization of volunteerism (Carter, 1974). The organized use of volunteerism and voluntary action may be traced to late eighteenth century England with the passage of "Rose's Act", formally named The Act For The Encouragement And Relief Of Friendly Societies, 1793 (Gladstone, 1979). The catalyst however, as noted by Sir William Beveridge (1948), began long before the involvement of the state in these "friendly" societies:

Friendly societies were and are creatures not of Parliament but of brotherly feeling and felt need in small groups of ordinary men throughout the length and breadth of Britain. A century before Rose's Act, Daniel Defoe, writing in 1696, devoted a chapter in his "Essay On Projects" to "Friendly Societies". (p.22)

The transformation of Britain's philanthropic ideals to North America, and particularly to Canada, appears to have been relatively rapid. Synonymous with the early "friendly societies" of Britain,

Canadian pioneers often joined together to aid neighbours in need, to form cooperatives, and, primarily through religious organizations, to provide charitable services and goods to those in need. While from 1867 onward the public sector had provided some limited relief for the needy, in areas of institutional care for the sick, mentally ill and retarded, it was generally accepted that private and church charity, would be the main source of resources for the delivery of social services (Carter, 1975).

During the early 1900's the first united front of voluntary organizations became a reality in Canada. Social welfare agencies, experiencing economic and organizational problems, began to form federations in an attempt to plan and coordinate fundraising efforts (U.C.S. Review Committee, 1970-72). Organizations formed in both Montreal and Toronto formally initiated the concept of the Community Chest (United Way of Canada, 1976), which reduced the competition for donations between voluntary agencies.

As the number of federations increased, so did the number of community fund raising appeals. In particular, during the World War I years (1914-1918), many community chests were formed to provide relief to war victims. At the conclusion of the war, many of these federations disbanded but the trend of joint efforts between the business community, social welfare agencies and federations was established. In Ontario, as noted by Cassidy (1932), the various private bodies that played a part in the distribution of relief during the pre-depression years, fell into one of the following six groups:

1. Private charitable associations, whose permanent function is the rendering of assistance to persons in need.

2. Citizens relief committees.
3. Permanent organizations which normally are not engaged in the dispensation of relief, but which are of a "service" or semi-philanthropic nature such as the Red Cross, the Daughters of the Empire, and the Business men's "service clubs".
4. Permanent organizations which are interested primarily in caring for any of their own members who may fall into difficulty such as Churches, trade unions, lodges and veterans' associations.
5. Organizations specially constituted to issue relief during the present emergency, such as shelter, hostel and soup kitchen committees, women's clothing committees, etc.
6. Employer and employee associations. (p.216)

During the depression years, mass unemployment forced federal, provincial, and municipal governments to assume a more active role in providing monetary aid to those in need. The primary contributors of relief at this time however were the private sector organizations.

In addition to the provision of relief, the late 1920's and early 1930's saw the development of the first Social Planning Councils in Canada.

Councils were formed as federations attempted to coordinate and develop better community services. They originally consisted of Agency representatives only and were called Councils of Social Agencies. With an expansion of activities beyond social service delivery into the areas of research, social policy development and advocacy, the Councils became known as Social Planning Councils with a broad community representative membership. (United Way of Windsor-Essex County, 1985, p. 1)

The forms of voluntary activity mentioned thus far are by no means exhaustive. They do, however, represent the areas of focus for this study. Voluntary action exists in many forms, from the smallest local neighbourhood group to the largest international organization. The National Advisory Council on Voluntary Action (1977) suggests that voluntary action fundamentally involves "individuals and groups seeking

to better their own conditions and those of people around them" (p. 3).

In addressing the diversity of voluntary action this organization presents the following key points:

1. Voluntary action is diverse because it is a fundamental human activity and therefore as varied as human interest and aspirations.
2. It involves Canadians acting and reacting of their own free will throughout the country.
3. Since voluntary action forms an integral part of daily life, it is difficult to delineate for definitional purposes. (National Advisory Council on Voluntary Action, 1977, p. 4)

This inability to define exhaustively the actions and activities of voluntary groups and organizations leads to the exploration of certain questions about volunteers in Canadian society today.

In 1975, a major survey (Carter, 1975) documented the nature of volunteer activity and charitable giving in Canada. This study found that:

1. Men and women are about equally involved in all five major categories of voluntary activity.
2. There appear to be few status differences in terms of what groups of people (for example, high or low family incomes, educational background) are to be found in various types of volunteer activity.
3. People of all ages are involved, with substantial representation of young people under 25 years. (15.7%) and of older people over 60 (15.6%).
4. The main reasons why people never give or become involved are lack of awareness about opportunities and the kinds of work available for volunteers, and the same kind of practical problems that often require volunteers to discontinue their work.

The study further found that:

5. Slightly more than half of Canada's citizens are involved in some form of volunteer activity or charitable giving. More than three-quarters of those active are engaged in practical work, the remainder in gift giving, e.g., blood, eyes, tissue, and money.
6. People who discontinue volunteer activity usually do so because they are beset by job, school or family responsibilities or by illness. Most would become re-involved if they did not have these problems. (pp. xix-xx)

These findings would suggest that the old stereotype of the volunteer as "an upper-middle-class, middle-age housewife with time on her hands and a desire to do good" is but that, a stereotype. (Carter, 1975, p. 16)

If we are to accept these findings as reality, we must then consider the factors which motivate the volunteer or potential volunteer. Carter (1975) states:

The motivation of people to volunteer or to give of themselves is not well understood, despite the fact that it is clearly of great importance to the whole phenomenon of volunteerism. (p. 26)

For many years, researchers (Carter, 1975). (National Voluntary Organization, 1981) (National Advisory Council on Voluntary Action, 1977), among many others, have attempted to identify the motivating factors associated with volunteerism. Most seem to agree that, to date, two rather dichotomic trends prevail. The first, is to view volunteerism and voluntary action as altruistic. The second, is to view voluntary action as motivated by self-interest. The additional motives

identified by Carter (1975), address sociability, rationality, and religious or ethical derivatives (p. 27).

In a report submitted to the Government of Canada, the National Advisory Council on Voluntary Action (1977), stated:

Today, many volunteers tend to place less emphasis on a charitable motivation and frankly admit that their involvement in voluntary activity arises from their need for self-expression, self-development, and self-protection. Given that large numbers of Canadians are heavily engaged in voluntary activity, many are seeking to fulfill their personal needs. Whether the volunteer experiences growth, needed human contact, the satisfaction of strong ego needs for social status or promotion within the company, political training, or the fulfillment of a need to get out of the house, the strength of the voluntary activity is that it makes no judgements about such needs. It simply accepts them and offers opportunities for their fulfillment in a socially useful manner. (p. 11)

Volunteerism and voluntary action, as expressions of a more philanthropic form of citizen involvement or participation, provide individuals and groups with an opportunity to fulfill their own need, as well as the needs of others. Regardless of the motivation, voluntary involvement represents a vital force for the delivery of human services in Canada.

The second prominent form of citizen participation that is considered to be relevant to this study is that of legal-political involvement. The following section will explore this area and its relation to the development of citizen reviews in private sector voluntary organizations. From this perspective, primary emphasis will be given to the exploration of the theory underlying the development of the jury system and the application of this concept to the organizational structure of voluntary organizations in contemporary society.

LEGAL-POLITICAL INVOLVEMENT AS A FORM OF CITIZEN PARTICIPATION

Citizen participation expressed in the form of legal-political involvement is probably the oldest form of organized citizen participation in the western world. As Head (1971) suggests: "The concept of citizens' participation is a very important part of the liberal-democratic theory of politics" (p. 14). To clarify this statement Head adds:

Political theorists have long recognized the fact that society is composed of a multiplicity of different interest-groups. In fact James Madison, writing in "The Federalist Papers" in 1787, recommended a republican form of government as a means of maintaining popular control of democratic structures in the United States. (p. 14)

Historically, the most renowned form of citizen participation has been the use of the ballot-box. Theoretically, citizens assume the responsibility of participating in a democratic government through the exercise of the franchise, and the government assumes its authority by consent of the governed (Head, 1971).

From an interrelated perspective, participation of citizens in the formulation and process of legal action has provided the western World with the concept of ~~social accountability~~. The jury trial system, although first cited in England in 1422, did not resemble the present day system until the early seventeen hundreds. Prior to that time, a problem known as "attaint" retarded the introduction of citizen reviews or jury systems. Attaint referred to the overriding powers of the state in matters being decided by citizens. As suggested by McCart, (1965):

The judges, being corrupted through their subservience to the King, continued to dominate trials even to the extent of restricting juries to evidence acceptable to the judge, and juries feared the wrath of the judges in the use of attaint. (p. 7)

In 1734 the case of John P. Zenger, which addressed liberty of speech and freedom of the press to criticize a public official, was heard in New York City. It was during this trial that the full power of the jury was asserted and exercised. Ordered by the judge, the jury had to restrict its decision to determining whether the publication had taken place or not, the judge was then to decide whether the writings were libelous. Seeing the profound injustice that was about to occur, the jury found Zenger not guilty of publishing the document and set the first precedent to overrule judicial domination of the jury (McCart, 1965). Thus, the concept of sanctioned judgement by peers was established.

The responsibility of those who accept the position and authority to make or pass judgement on their peers may best be explained by Simon (1980) who states:

The duty of the jury is indeed to find the facts upon the basis of the evidence presented and to issue a general verdict by applying those facts to the propositions of law given by the judge. (p. 8)

This authority to make judgement on behalf of the community is not without drawbacks. As laypersons of society, jurors are susceptible to a variety of inflictions which influence citizens of a particular era, habitation, or sector of society. The primary form of influence has been commonly cited as "societal norms". These norms of society have, throughout the years, reflected the prejudice, dogmatism, and religious conviction of society, which in turn has influenced the juror's decision.

In addition to factors which influence the juror as an individual, there are a variety of factors which affect this "judgement by peers"

form of justice. These additional factors come into play when the selected members join together to deliberate the issues and declare judgement.

As laypersons, the process of decision making may be considered either inhibited by the jurors' lack of knowledge and expertise of the rules which mandate and govern the issue, or the process may be enhanced, by providing a forum which is uncorrupted by the knowledge gained through too much expertise whereby loopholes and shortcuts may be utilized.

Another factor which effects the decision making process of jurors relates to the dynamics of the group itself. Power struggles among members, hidden agenda and coalitions may interfere with "the finding of facts" of the issue of concern.

These are but a few of the factors which affect decisions derived through the citizen review system of justice. The following section will pursue some of these issues in greater depth as they relate to the transformation of concepts and ideals developed from legal-political forms of citizen review systems into other forums found in today's society. Particular attention will be given to citizen reviews as a means of ensuring fiscal accountability from social institutions.

THE DEMAND FOR ACCOUNTABILITY

One of the primary features of living in a democracy is the right to demand that those who govern our lives, account for their actions. Though in times of prosperity this right may seldom be acted upon, we as citizens of a democratic society are more apt to call to account, those

to whom we entrust our lives, in times of deprivation, hardship, or disaster. This demand for accountability, from an individual perspective, is a form of citizen review in that our judgement of satisfaction or dissatisfaction is carried to the ballot-box.

When, as indicated above, there is a demand for more accountability on the part of government, individual citizens tend to form groups to represent their "public interest". This form of citizen participation provides the foundation on which most lobbying groups in North America have been formed. Organizations such as consumer groups and chambers of commerce are typical forms of these interest groups.

On a smaller scale, interest groups formed from neighbourhood coalitions, and various ethnic, socio-economic, and racial organizations have accomplished impressive results when addressing issues with local governments. As stated by Head (1971):

Citizens'-participation groups tend to focus their concerns and activities upon community agencies and institutions that do not meet their needs, as perceived by their members and leaders. Welfare-rights groups, tenant-rights groups in both public and private housing, groups organized to obtain increased day-care facilities for children, groups organized to improve the education of their children, and groups organized to promote the rights of racial and ethnic groups are but a few examples of citizen review organizations. (p. 22)

In the private sector, two primary divisions have emerged with rather polarized forms of organized-accountability measures. In the following section, these two divisions: business organizations and voluntary philanthropic and semi-philanthropic organizations will be discussed in terms of the accountability measures utilized to maintain appropriate standards.

Accountability in the Private Sector

The business community, from the private entrepreneur to the large corporate body, has long viewed internal accountability as a factor in the survival of their businesses. Based on principles of supply and demand and quality of product, organizations which produce goods or provide services have gone to great lengths to evaluate and review their methods and outcomes to maintain their edge in the market place.

Accountability of actions within the business world has been a major topic of discussion and research for organizational theorists and business consultants for many years. The most widespread organizational theory which considers accountability to be a pertinent factor is the bureaucratic theory. Max Weber, who dedicated the majority of his writings to this particular organizational theory, considered it to provide both internal and external forms of accountability. Internally, a clearly defined hierarchy and rigid lines of authority and legal-rational rules enhance strict reporting procedures from lower levels of the organization upwards. Externally, accountability is established through comparison of the operative goals and organizational output. This might suggest that the business organization which utilizes a bureaucratic form of organizational structure may be, in relation to output, considered self-monitoring or "internally accountable".

In terms of private sector philanthropic and semi-philanthropic organizations, the necessity of providing accountability measures, particularly in the area of human service delivery, has but recently received a great deal of attention. In the past decade, governmental budget restraints, discontinuation of services, and overall economic

recession, have increased the role of the voluntary organizations to one which assume even more responsibility for the provision of human services, and, a means by which these organizations can ensure appropriate utilization of funds for these services.

Consequently, the need to provide appropriate accountability measures to the communities who sponsor these services has become an interical part of the voluntary human service organization's operations.

As stated by Oper (1978)

the recent public awareness and concern for accountability in the human services field could result from the fact that adequate means are not readily available to measure results.
(p. 21)

It is in response to this issue that many voluntary human service organizations have developed means by which their programs and services can be evaluated.

Unlike the field of business, voluntary human service organizations, like the United Way of Windsor-Essex County, have been expected to provide more specific forms of fiscal accountability measures than in the past. Some human service organizations have chosen to draw concepts from the "jury type systems" or citizen reviews to provide these measures. These citizen review systems may be combinations of various committees who take responsibility for particular projects or programs, or they may be represented in the form of a board of directors. In each case, citizens are recruited from the community and either trained for a specific role in the evaluation process, or must rely on expertise gained through careers or academic channels.

The following sections will address the recruitment and training processes used to establish voluntary citizen review systems in private human service organizations.

RECRUITMENT OF VOLUNTEERS

The recruitment of citizens into voluntary positions requires in itself a great deal of time, energy, and resources. An effective recruitment process begins with an understanding by the organization of its goals and objectives. Once this is established, the organization's needs in terms of number of volunteers required, the particular qualities desired, and the degree of intensity of the available positions will be understood.

When the needs of the organization are primarily to establish community-based accountability measures, the recruitment process may be analogous to the selection of jury members. In the judicial process of juror-selection, representatives for both litigants select jurors that are considered to possess the attitudes, biases, and personalities that will best suit the circumstances of their case. Similarly, recruitment of individuals from the community for positions on a citizen review board require the organization to attempt to select members who possess the skills and interests required to effectively complete the tasks.

One qualification that should be considered however, is the scope of membership desired. As suggested by Glover & Mickelson (1981):

We believe it should be the ideal goal of every voluntary organization to have a board and committees that are representative of the community they serve. By striving for this cross section of the community, an agency can expect broader acceptance and support for its programs. When more

perspectives are represented in the decision-making process or program delivery, better-informed decisions will be the result. This suggests including women, retirees, minorities, youth, clients, laborers, ect. (p. 13)

Since this is the case for many voluntary organizations, a more extensive search for volunteer members might be considered. This may entail the use of indirect recruitment. Glover & Mickelson (1981) define indirect recruitment as: the utilization of "newspaper, radio, television, and posters" for the purpose of interesting citizens in a voluntary position (p. 12). As stated previously in this chapter "the main reason for the non-involvement of people who have never volunteered or made charitable gifts is lack of awareness" (Carter, 1975). Carter further states:

It may be speculated that the lack of specificity in job descriptions does not enhance the chances of attracting people into what may seem merely another run-of-the-mill job. Also, the frequent neglect to spell out what training is available may discourage people from tackling a job in which they are deeply interested. (p. 87)

In addition to these problems, the volunteer organization's recruitment personnel must consider:

1. What particular qualities are desired in the volunteer;
2. What forms of recruitment are available, or practical for the organization to utilize;
3. What, if any, are the specific target populations desired;
4. How specific must the description, of volunteer qualities and position available, be?

All of these issues should be addressed before a plan for recruitment is selected since this "plan" will influence the quality of the volunteer contribution.

Once recruitment and selection of volunteers is complete, the training sequence begins. The following section will provide an overview of factors and processes utilized in the training process.

TRAINING OF VOLUNTEERS

In many circumstances, the training of volunteers begins during the recruitment process. During this time, the prospective volunteer acquires a feeling for the organization, its mission, its personnel, and the working climate (Ministry of Culture and Recreation Ontario, 1971).

The actual training programs used to prepare volunteers for a particular task are in many cases as varied as the number of voluntary organizations. Carter (1975) in her study of volunteers states:

For those who have worked in the volunteer field it will come as no surprise to learn that there is a great deal of such material - the main problem is that it has been developed by and for specific organizations, and very few people outside these organizations know of its existence. (p. 96)

The Report of the National Advisory Council on Voluntary Action to the Government of Canada (1977) cites:

In the Cooperstock study commissioned by the Council, it was discovered that 41 per cent of 195 local associations believe the best way to train volunteers is to have them work with other volunteers, whereas 35 per cent of the sample argued that on-the-job training supervised by professional staff was the best way to produce a volunteer with the necessary skills. (p. 69)

Each agency must consider the purpose of the training process and the preferred outcome before selecting its training techniques. If the purpose of a training program is to help the volunteer to learn those skills necessary to accomplish a task, the training technique selected will be quite different from a purpose of helping the volunteer to

understand the goals, history, and information center at the agency or organization.

Glover & Mickelson (1981) suggest the following rationale and training techniques for volunteers:

The size of the learning group will influence the selection of appropriate techniques for training volunteers. Thus the number of people involved is one of the first decisions to be made in planning a training session. The events will probably fall into one of these general categories:

1. skills workshop
2. small groups (task-oriented)
3. a training course
4. individual study
5. one-to-one instruction

Methods that might be considered for the various kinds of training groups are:

1. CASE STUDY: A real-life situation portrayed in film or in narrative.
2. PANEL: A planned conversation before a group. Audience asks questions afterward.
3. DEMONSTRATION: A carefully planned presentation showing how to perform a task. Useful when oral description is difficult to visualize.
4. GROUP WORK, WORK GROUPS: Each subgroup or team is given a specific project; everyone becomes involved and can explore a subject in more depth.
5. OBSERVATION: Visiting for purpose of witnessing how another person does a particular task.

6. DRAMATIZATION: A prepared, enacted scene to demonstrate a situation or technique.
7. ROLE PLAYING: Spontaneous portrayal of a situation by members of the group.
8. DISCUSSION: A conversation on a given topic. Especially effective with six to twenty people.
9. AUDIOVISUAL: Any nonparticipatory technique calling upon audio or visual reception.
10. LECTURE/LECTURETTE: A prepared talk or short talk. Presents information in logical order. (p. 17)

With the purpose and training techniques in mind, the organization which utilizes volunteers must remember that some types of voluntary activity require more skill and training than others. It is therefore the responsibility of the organization to attempt to channel volunteers to tasks that are within their abilities and provide appropriate training methods to fulfill the demands of the positions (Report of the National Advisory Council, 1977).

This chapter has provided an overview of various factors which contribute to a general understanding of the voluntary sector organization and the basic processes utilized to provide accountability measures to the community in which they operate. The following chapter will provide a closer look at the particular setting explored in this study. First, an overview of the historical and organizational perspective of the United Way of Windsor-Essex County will be discussed. This will be followed by a more extensive look at the process utilized by this organization to provide accountability measures to the community.

Chapter III

THE UNITED WAY

HISTORICAL PERSPECTIVE

As noted in chapter two, the movement to unite private voluntary organizations in Canada began with the formation of a Federation of Jewish philanthropies in both Montreal and Toronto in 1917 and the establishment of the Toronto Federation for Community Services in 1918. It was several years however before any expansion occurred. As private social service agencies began to accept the benefits which accompanied joint appeals, the number of federated organizations increased rapidly (United Way of Canada, 1976).

During the early stages of this development, the social planning movement also became a prominent feature in many communities. Their purpose was the planning and coordination of the health and welfare services in their respective communities. The first social planning councils were formed in the late 1920's. These councils were initially formed as federations, known as Councils of Social Agencies, which consisted of representatives from various social agencies. Eventually, these Councils expanded their activities beyond the delivery of social services to the areas of research and development. In addition, they expanded their membership to more than just social agencies and became known as Social Planning Councils (United Way of Canada, 1976).


Eventually the Community Funds and Councils of Canada separated from what was then known as the Canadian Welfare Council and in 1972 changed its name to the United Way of Canada. Though this separation was an attempt to gain autonomy and national visibility, these two organizations remain bonded by their common interests in the field of social service delivery (United Way of Canada, 1979).

A DEVELOPMENTAL VIEW OF THE UNITED WAY OF WINDSOR-ESSEX COUNTY

The first community public fund-raising campaign in Windsor was conducted by the Y.M.-Y.W.C.A., in 1924. In the early 1930's the formation of a collective fund-raising body was established. Known as the Border Cities Citizens Service Committee, this organization conducted an annual fund raising campaign, among certain industries in the Windsor area. This organization was later named the Windsor Community Services, Inc. (United Community Services of Greater Windsor, 1969).

In 1947, the Windsor Community Services was incorporated as a joint fund-raising body and renamed the Community Fund of Windsor. This change represented an attempt to eliminate multiple financial appeals and an effort to gain more control over the distribution of funds to the respective human service areas (UCS Review Committee, 1970).

During this approximate period, the formation of the first social planning council for the Windsor area was initiated. The Windsor Health and Welfare Council was created in 1948. Its objectives were to conduct year-round planning and co-ordinating among health and welfare services in the City. (United Way of Windsor Essex County, 1985, p.1) Twelve



years later (1960) the Community Fund of Windsor and the Windsor Health and Welfare Council merged under a common administration. The organization was renamed the United Community Services of Greater Windsor in 1962 to reflect the combined functions of planning, coordinating and fund-raising. In 1975, the organizational name was changed to the United Way of Windsor-Essex County, to coincide with the United Way of Canada and gain a national identity (United Way of Windsor-Essex County, 1985).

PURPOSE AND STRUCTURE OF THE UNITED WAY OF WINDSOR-ESSEX COUNTY

As stated by the Long Range Planning Committee (United Way of Windsor-Essex County, 1984), The purpose of establishing an organization with planning, co-ordinating and fund-raising functions was to: increase the organized capacity of people to care for one another in endeavouring to meet the existing and emerging human service needs in Essex County, by providing leadership, as a facilitating voluntary body. (p. 7) It attempts to accomplish its purpose through its two divisions: Campaign; and Planning, Allocations, and Agency Relations. The campaign division plans and organizes the annual fund-raising efforts for the organization, and enlists over 3,500 volunteers and raises funds in the seven-figure range (United Way of Windsor-Essex County, 1984). The Planning, Allocations, and Agency Relations division is responsible for:

- (a) "identifying social needs in the community and attempting to establish services to meet those needs";
- (b) "distributing funds raised through campaign efforts to member agencies, programs, and pilot projects, as well as monitoring these agencies to ensure appropriate

utilization of funds (program and budget reviews)"; and (c) "communicates on a year-round basis with these agencies providing information, and liaison". (United Way of Windsor-Essex County, 1984)

The organizational structure utilized by the United Way of Windsor-Essex County is comprised of a board of directors which has twenty-six community volunteers; five primary Committees which address campaign, labour, (planning, allocations, and agency relations), finance, administration, and communication, and three secondary Committees which address the individual areas of planning, allocations, and agency relations.

This present structure came as a result of recommendations made by the Long Range Planning Committee (1984), and is depicted in chart form in Appendix A and B. These charts indicate the responsibilities held by the volunteer board and the professional staff, and also outlines the lines of authority in this organization.

UNITED WAY PROGRAM AND BUDGET REVIEW PROCESS

It is within the Planning, Allocations and Agency Relations Division that the program and budget review process is conducted. The allocation of United Way funds to member agencies, special projects, county agencies, and national and provincial programs is an annual endeavour. In response to the extensive demands of the allocation review structure, a committee was activated to oversee and implement annual reviews of its sponsored programs and agencies.

Allocations Committee

The Allocations Committee is responsible for the assessment of the services provided to the community by its member agencies and programs. The review process confirms the need for the agency's services, determines the support level for individual programs, and serves as an integral part of the ongoing planning, undertaken by both the agencies and the United Way (Program & Budget Review Manual, 1982).

The Allocations Committee is one of the standing committees of the United Way Board and, when the review panel members are included, is comprised of approximately 60-70 volunteer members which are selected from the community. The committee is comprised of two parts: the executive committee and the review panels which, are chaired by the members of the executive committee.

Allocations Executive

The Allocations Executive has 8 members; a Chairperson, a Vice-Chairperson, and the Chair for each of the review panels. The executive is responsible for organizing and overseeing the reviews, and evaluating the performance of panels and the review process itself. The executive are also responsible for the development of recommendations for the board of directors regarding all facets of the United Way's allocation policies and procedures.

On a year-round basis the executive deals with requests from agencies for consideration of program or staff changes requiring United Way approval, or contingency items that may affect budgets which were unforeseen at the time of the review. The executive committee is also

responsible for ensuring that requests for assistance from the agencies are followed up and appeals from member agencies regarding their allocation levels are dealt with, throughout the year (Program and Budget Review Manual, 1982).

Allocations Committee Review Panels

Each panel is chaired by an executive member and is made up of approximately six to seven volunteers. Because of the important and varied nature of its work, each panel should represent as wide a cross-section of the community as possible. It is hoped that through this representation, the needs and interests of all parts of the community will be addressed. Each panel reviews approximately four to five agencies. Based on a study of formal agency submissions and a meeting with the agency board and staff, the panel develops recommendations regarding programs and support levels for the following year (Program and Budget Review Manual, 1982).

United Way Staff Role

Each panel is assigned a United Way staff person to carry out a number of responsibilities and in general to act as a professional resource person to the panels. The following are a number of the activities suggested by the United Way of Windsor-Essex County, which are to be carried out by the staff member on the panel.

1. Work closely with chairperson to help organize and facilitate meetings.
2. Organize and supply the panels with materials such as agency submissions, audited statements, supplementary materials, and other resource materials.

3. Record panel meeting minutes and prepare summary sheets.
4. Preview agency submissions prior to panel meetings and obtain clarification or additional data from agency if required. In some circumstances, the chairperson may need to be consulted in relation to the nature of the problem.
5. Assist chairperson to clarify United Way policies.
6. During the pre-meeting, staff will be active in presenting their analysis of the agency submissions, helping to formulate questions, pointing out problem areas, and providing whatever additional information is necessary.
7. During post-meeting, assist the chairperson to ensure that all factors are taken into consideration. (United Way Review Manual, 1982, p. 16)

P & B Review Process Overview

Goals:

The primary goals of the program and budget review process at the United Way of Windsor-Essex County are: to provide a process or methodology from which funds raised by the organization may be effectively and efficiently allocated to member agencies; to allocate funds to special projects and services based on perceived community needs; and to utilize voluntary services of as broad a range of community citizens for the purpose of conducting these reviews.

To achieve these goals, a series of objectives have been devised which address the key factors, considered by the organization, to be essential to the accomplishment of the goals. It is from these objectives, that the sequential stages, time frames, and other structural components of the review process have been developed.

Objectives:

1. To devise a format suitable for conducting effective and efficient agency and program reviews.
2. To formulate and activate a recruitment process which will provide the review process with a membership that represents as much of a cross section of the community as possible.
3. To formulate and activate a training program for the Allocations Committee panel members which will provide the information and skills needed to conduct agency and program reviews effectively and efficiently.
4. To recruit a sufficient number of volunteers who possess a level of knowledge and expertise in areas related to human services, business, finance, and who have participated in previous review processes that will be appropriate to fill the position of Executive Committee member. (compiled by researcher and thesis committee chairman R. Chandler, 1985)

The following is an overview of the complete program and budget review process as well as an approximate critical path, from the 1985 process, which will provide the suggested time frames of the process.

1. PHASE 1 January - March

Phase one of the process is dedicated to the recruitment of panel members. These members are selected so as to be representative of as much of the community as possible, so that the needs and interests of all areas of the community are addressed. It is also at this time that agencies are sent report forms to begin preparing their submissions.

2. PHASE 2 March - April

This phase of the process is geared toward the training of panel members. All volunteers participate in training sessions in order to prepare them to meet the demands of the agency reviews. For new volunteers, training consists of two complete sessions while continuing panel members participate in a single refresher session. During this time, an orientation session is also held for member agency staff and volunteers.

3. PHASE 3 MAY - JUNE

Phase three is the phase in which the actual agency review takes place. Within this phase there are a number of steps through which the process must flow to complete its task. Although the process within this phase may change marginally from year to year, in a general sense, it is as follows:

- a) Each agency completes a standard form which outlines: its programs, methods of operation, the extent to which objectives were accomplished, and how the funds received from United Way and other sources, were spent. On the same form, agencies indicate their program plans and the budgetary requirements for the programs which they are planning for the succeeding year. This information is submitted to the United Way Allocations Committee by the end of April so that it can be reviewed.
- b) The designated panel attends on-site at the respective agency on the evening of the review for a panel discussion of the agency submission and to devise questions, that will clarify any problems identified from the information provided on the

forms, or help the panel to clarify questions about the particular needs of the agency.

c) The panel then meets with the agency board. The purpose of this meeting is to give the agency the opportunity to clarify any aspects of its presentation and to respond to the questions that may be forthcoming from the panel members.

d) Immediately after the panels meeting with the agency representatives, they meet to consider all pertinent information and to outline written recommendations that will be submitted to the Planning, Allocations and Agency Relations Committee.

4. PHASE 4 JUNE

In this phase of the continuum, all of the panel recommendations are reviewed by the executive, in preparation for the final report meeting of all panel members. At this meeting of the executive, the recommendations are formalized and forwarded to the United Way Board of Directors. It is also at this meeting that a tentative figure is submitted to the Goal Setting Committee as an indication of the campaign goal required to reach the community-needs objective.

5. PHASE 5 JULY - AUGUST

In this phase, the United Way Board of Directors receives the reports from both the Allocations Committee and the Goal-setting Committee and determines the tentative allocations and the campaign community-needs objective. Each agency is then notified of its tentative budget allocation and program

recommendations for the coming year. These determinations are tentative since they are conditional of a successful fall campaign.

United Way organizations, both locally and nationally, have been through many changes in the past, and will hopefully attempt to maintain their progressive attitudes towards change, in the future. Locally, the United Way was contrived as a means of providing charitable goods, services, and monies to those in need, but, as a consequence of its funding source, must also maintain acceptable accountability measures to the community from which solicited funds have been received. The program and budget review process is one of these accountability measures which was developed to ensure that the funds allocated to United Way member agencies are utilized in a manner acceptable to the community.

In Windsor-Essex County, this review process has, over the years, been constructively scrutinized, both internally and externally. The willingness to make structural and administrative changes demonstrates this organization's interest in making the review process more effective. This chapter has provided an overview of the historical and developmental factors which have contributed to the present structure of the United Way organization in Windsor-Essex County, as well as provided a review of the program and budget review process, which is the basis for this study.

The following chapter outlines the methodology utilized in this program evaluation to determine the effectiveness of the program and budget review process used by the United Way of Windsor-Essex County.

Chapter IV

METHODOLOGY

RESEARCH DESIGN

Research designs are the plans, structures, and strategies of investigations which are utilized to obtain answers to research questions. The design denotes the overall scheme of the research process, from the initial conception of the study to the dissemination of the findings. The purpose of a research design is to provide a structure for the systematic procedures for producing data pertaining to the development, modification, or expansion of knowledge (Grinnell, 1981, p. 198).

This study may be classified as a formative program evaluation (Tripodi, 1983). A formative evaluation of a program provides information related to the development of that particular program, and it utilizes information directly pertinent to that program and findings are not intended to be generalized to other programs (Tripodi, 1983, p. 4). The "level of knowledge" sought in this evaluation is quantitative-descriptive, and the study design utilized was a cross-sectional survey (Grinnell, 1983). The cross-sectional survey provides quantitative-descriptive data which can be generalized to the designated population (Grinnell, 1983; p. 213).

Since the intent of this study was to determine the effectiveness of the program and budget review process of the United Way of Windsor-

Essex County, knowledge derived from quantitative-descriptive data proved to be satisfactory. This "level of knowledge" allows the researcher to "establish facts that state the existence of empirical relationships between two variables", and, in the case of this study, allowed descriptions of the process to be made by those who have participated in the review process (Tripodi, Fellin, Meyer, 1969, p. 41).

Since this research design "stresses representativeness of all elements for the unit under study", the complete population was surveyed (Grinnell, 1983, p. 214).

Establishing the parameters of this research first required the identification, definition, and specification of the intended focus. The following sections will discuss both, the intended focus of this study, as well as the research questions which have been devised as a result of the focus.

FOCUS OF THE EVALUATION

The focus of this evaluation was based upon the objectives of the program and budget review process of the United Way of Windsor-Essex County, as described in Chapter 3. These objectives identify and define the areas of investigation that will be addressed. In summary, this evaluation will investigate:

1. the method of community based citizen review, utilized by the United Way of Windsor-Essex County in their program and budget review process;

2. the recruitment of community volunteers, as a method of social service accountability, for a private agency;
3. training of community volunteers, for the purpose of undertaking a citizen review;
4. the structural components of the citizen review process used by the United Way of Windsor-Essex County;
5. the attitudes of volunteer panel members towards the program and budget review process and its effectiveness.

The areas discussed in this focus are considered to be relevant to the effectiveness of a citizen review process. As a result, the following research questions have been devised in an attempt to explore these areas, as they relate to the program and budget review process used by the United Way of Windsor-Essex County.

RESEARCH QUESTIONS

1. Does the recruitment process used for the Allocations Committee membership by the United Way of Windsor-Essex County provide an effective means of representing the community?
2. Does the orientation and training process, used by the United Way of Windsor-Essex County, Allocations Committee provide sufficient time, instruction, and reference material for the volunteer panel members to prepare them for the review process?
3. Does the program and budget review process, utilized by the United Way of Windsor-Essex County, provide an effective structure for evaluation of member agencies and programs?

DEFINITION OF CONCEPTS

The concepts used in this study are defined as follows:

1. Recruitment: The enlistment of members of the community from whom voluntary services relative to the program and budget review process are requested.
2. Training: The process or methods used to enhance the understanding and skills of the volunteer panel members in preparation for the review process.
3. Evaluation: The process used to establish the effectiveness or efficiency of the various programs and projects sponsored by the United Way of Windsor-Essex County.
4. Program and budget review process structure: The various stages utilized during the review process and the consequent time frames for each stage.
5. Accountability: The responsibility of the United Way and agencies or programs funded by the United Way to explain or justify to the community the expenditures of the funds which have been received from the community

POPULATION

The target population of this study consists of all volunteer panel members of the United Way of Windsor-Essex County Allocations Committee, for the years 1983, 1984, and 1985.

The decision to include panel members over a three year period reflects an attempt to identify variations in the process, both functionally, and qualitatively, which, in turn, might provide a developmental perspective for analysis.

DATA COLLECTION INSTRUMENT AND COLLECTION PROCESS

The Instrument

Because of the size of the study population, the researcher utilized a questionnaire as the instrument for data collection. This form of data collection instrument allowed the researcher to provide a standardized instrument to all respondents. In addition, the questionnaire provided respondents with a greater confidence in their anonymity and, as discussed by Kidder (1981), allowed the respondents to "feel freer to express views they fear might be disapproved of or might get them in trouble" (p. 148).

The questionnaire was developed by the researcher after careful examination of the relevant literature and review of the intent of the study. This in turn required examination of the objectives of the United Way of Windsor-Essex County's program and budget review process as described in Chapter 3.

Relative to the review process objectives, the questionnaire was divided into four sections. The first section attempted to acquire demographic information on the population. The subsequent sections addressed recruitment, orientation and training, and review process structure, respectively.

In the development and construction of the instrument, the researcher followed the procedure suggested by Kidder (1981, pp. 159-163), which involves six sequential steps: deciding what information should be sought, deciding what type of questionnaire should be used, writing a first draft, re-examining and revising questions, pre-testing, editing the questionnaire and specifying procedures for its use.

To establish what information should be sought, the researcher first attended a meeting of the Allocations Committee executive at the United Way of Windsor-Essex County. From this meeting, the ideas and suggestions of the executive were noted. The goals and objectives of the review process were identified, and questions were devised accordingly. In deciding what type of questionnaire to be used, the researcher reviewed the literature on questionnaire construction (Selltitz et al., 1967; Grinnell, 1983; Kidder, 1981) and chose a format suitable for this particular study.

The data collection instrument combines a variety of factual and attitudinal questions which seek both open-ended and close-ended responses, as well as a series of summated, five point, Likert-type scales. The Likert-type scale, as suggested by Selltitz et al., (1967) is the "most frequently used in the study of social attitudes" (p. 366). The rationale for the utilization of this particular type of scale is that it allowed respondents to express varying degrees of agreement-disagreement on a number of subjective variables.

These scales provide the respondent with measurement descriptors at both exact lower limits (point #1), and exact upper limits (point #5). This provides the respondent with the parameters for the response. The distance between the exact lower limits and exact upper limits of the scales, such as lower-middle, middle and upper-middle, are not indicated on the scale by a descriptor but are indicated numerically.

The first draft of the questionnaire was reviewed by the researcher's committee chairman. A tentative agreement of content was reached and subsequently copies were submitted to the two other

committee members. The necessary revisions were made and the questionnaire content was again tentatively approved.

Fifteen copies were submitted to the United Way of Windsor-Essex County's Allocations Executive Committee for pre-testing; and time was allocated on the Executive Committee's meeting agenda to discuss the structure and content of the questionnaire. The respective modifications were made and a final draft submission was made to the researcher's thesis committee. Approval of structure and content was made and the questionnaires were prepared for distribution.

To specify the procedures for the use of the questionnaire, a letter was prepared which provided the pertinent information. This letter was submitted to the chairman of the Allocations Committee for review and consequent signature. This letter was requested as a means of informing respondents that the research had been approved by the United Way. The letter was attached to each copy of the questionnaire. (see Appendix C and D for cover letter and final questionnaire).

The Data Collection Process

Arrangements were made with the Chairman of the United Way's Allocations Committee, to administer the questionnaire at the summary meeting of the 1985 Allocations Committee. All volunteers who participated in the 1985 review process were expected to attend this meeting, but due to low attendance, only an approximate one-half of the 1985 sample were administered the questionnaire in this manner.

The remaining one-half of the questionnaires were mailed out to the volunteer panel members that were absent from the final meeting, and all of those members from the 1983 and 1984 reviews.

Method of Data Analysis

The statistical procedures used to tabulate and analyze data consisted of primarily descriptive statistics with the utilization of one inferential statistic, the t-test. Both measures of central tendency and dispersion were utilized to demonstrate comparisons of ratings on most ordinal scales.

Since this investigation involved the total population, there were no sampling procedures and therefore no statistical tests on the significance of the findings. The level of significance sought for the t-test analysis was $P = <.05$.

The analysis of data consisted of several steps. The first was the tabulation of frequency distributions of responses from all questions on the questionnaire. After reviewing these frequencies, the researcher created several new variables from the raw data. This was accomplished by combining certain variables which addressed a common theme or characteristic. These new variables were thought to provide further insight to the findings. Complete univariate statistics were then run on all variables to acquire measures of central tendency and dispersion which would provide the basis for descriptions.

There were a total of 67 variables, 59 of which were derived from the questionnaire, and eight which were created from the raw data (i.e. overall rating of the review process was achieved by combining the scores from all variables which addressed the review process). All variables were analyzed using at least one of the previously mentioned statistical procedures.

The questionnaire was pre-coded to assign numeric values to all questions. The analysis was divided into sections which addressed the three research questions cited previously in this chapter.

Study Limitations

This study has the following limitations:

1. The reliability of the questionnaire has not been standardized, however, it was pre-tested by the 1985 Allocations Committee Executive and found to provide the kind of information which was sought.
2. Respondents may have felt uncomfortable discrediting the process in any way due to their affiliation with the organization. The opportunity to partially test for this bias was however established by having one third of the questionnaires administered by the United Way staff. Total scores from these questionnaires were compared to the total scores of those questionnaires that were mailed to respondents. A two-tailed test was administered and when analyzed resulted in insignificant relationships. It should be noted that since this test was conducted only on the 1985 respondents, this limitation is still considered applicable.
3. Although the total population of Allocation Committee members from 1983 onward were used in this study, the personal characteristics of this review process restricts the findings from being generalized to other United Way organizations.

4. Since a deadline cutoff date was identified on those questionnaires that were mailed out, the total number of returned questionnaires might be lower than if no deadline date had been identified.
5. There are a number of political factors involved in the United Way of Windsor-Essex County that may have influenced this study's findings, these factors were neither identified, nor controlled for.

Chapter V

ANALYSIS OF DATA

As stated previously in chapter four, the data for this study were collected by questionnaire. The questionnaire was administered to half of the 1985 Allocations Committee and mailed out to the other half as well as to the members from the 1984, and 1983 reviews. Of the 140 questionnaires that were distributed, 80 were returned by the cut-off date of June 30, 1985.

The analysis of data, collected for this study, will be presented in the following manner: the first section of this chapter will describe the demographic characteristics of the population, followed by sections which present data related to the three research questions, as stated in chapter four. At the beginning of each section, the respective research question will be presented and will be followed by the appropriate data and then the subsequent analysis.

DESCRIPTION OF POPULATION

The first nine questions of the questionnaire supplied the researcher with information relating to the gender of the Committee members, their responsibility during the review process, the age of the respondents, their religious affiliation, the occupations of both the respondent and their spouse, and finally, the number of family members residing at the respondent's home.

Description of Population by Gender

The respondents consisted of 42 males, who represented 52.5% of the population, and 38 females who represented 47.5% of the population, as indicated in Table 1.

TABLE 1
Description of Population by Gender

Gender	Frequency	Percent
Male	42	52.5
Female	38	47.5
Total	<u>80</u>	<u>100.0</u>

Note. N = 80

Description of Population by Age

As indicated in Table 2, two (2.53%) of the respondents were between the ages of 18-24, 24 (30.38%) respondents were between the ages of 25-35, 25 (31.64%) respondents were between the ages of 36-45, 15 (18.98%) were between 46-55, 10 (12.65%) were between 56-65, and finally three (3.79%) were over the age of 65. The Median age-range of Allocations Committee members was 36-45.

TABLE 2

Description of Population by Member's Age

Age	Frequency	Percent
18-24	2	2.53
25-35	24	30.38
36-45	25	31.64
46-55	15	18.98
55-65	10	12.65
66-over	3	3.79
Total	<u>79</u>	<u>100.00%</u>

Note. The Median age-range of respondents is 36-45. N=80: Missing value = 1.

Description of Population by Member Responsibility

Those respondents who were panel members represented 71 (88.75%) of the population, while seven respondents participated as chairpersons and represented 8.75%. Two respondents had responsibilities of both panel member and chairperson at some time over the three year period and represented 2.50%.

Table 3 indicates the distribution of the population by the member responsibility.

TABLE 3

Description of Population by Member Responsibility

Responsibility	Frequency	Percent
Panel member	71	88.75
Chairperson	7	8.75
Chair and Panel member	2	2.50
Total	80	100.00

Note. Total number of respondents = 80.

Description of Population by Marital Status

Those subjects who were married represented 55 (69.62%) of the population, while 12 (15.19%) were single. Divorced respondents represented nine (11.39%) while separated and co-habiting respondents represented two (2.53%) and one (1.26%) respectively. As indicated in Table 4, there were no widowed respondents and there was one missing value.

TABLE 4

Description of Population by Marital Status

Marital Status	Frequency	Percent
Married	55	69.62
Single	12	15.19
Divorced	9	11.39
Separated	2	2.53
Widowed	0	.00
Co-habit	1	1.26
Total	79	99.00%

Note. N=80: missing value = 1.

Description of Population By Occupation of Respondent and Spouse

As indicated in Table 5, those respondents who cited "professional" occupations represented 33 (43.42%), while 26 (34.21%) cited "para-professional" occupations. Four (5.26%) respondents had occupations in "skilled trades", while three (3.94%) cited "labour" as their occupation. Those respondents who cited "domestic" occupations represented one (1.31%) while those that responded "unemployed" or "retired" represented one (1.31%) and six (7.89%) respectively. No respondents cited "clerical" positions while two (2.63%) respondents had occupations other than those on the questionnaire. Four missing values were noted.

TABLE 5

Description of Population by Occupation for Respondent and Spouse

Occupation	Respondent		Spouse		Total
	Frequency	Percent	Frequency	Percent	
Professional	33	43.42	19	37.25	52
Para-Prof.	26	34.21	21	26.92	47
Skilled Trade	4	5.26	2	3.92	6
Labour	3	3.94	1	1.96	4
Domestic	1	1.31	9	9.83	10
Clerical	0	.00	4	7.84	4
Retired	6	7.89	3	5.88	9
Unemployed	1	1.31	2	3.92	3
Other	2	2.63	1	1.96	3
Total	76	100.00	51	100.00	127
					100.00%

Note. There were a total of 80 respondents and 56 spouses. Missing values for "Respondents" = 4; missing values for "Spouses" = 5.

Also identified in Table 5, the occupations of the spouses, as cited by the respondents, were as follows: 19 (37.25%) of the spouse's were cited as "professional", while 14 (27.45%) were cited as "para-professional". Two of the spouse's (3.92%) were cited as having

"skilled trades", while one (1.96%) was cited as having a "labour" position. The domestic occupations of spouse's represented five (9.80%) while the unemployed and retired represented two (3.92%) and one (1.96%) respectively. Four (7.84%) of the spouses were identified by the respondents as having "clerical" occupations while 29 failed to respond (missing values= 29).

Description of Population by Religious Affiliation

Nine (14.06%) respondents declared themselves as Protestant, while 24 (37.50%) represented those of the Roman Catholic religion. Nine respondents (14.06% of the population) declared themselves as Anglican and eight (12.50%) were United. Those respondents who represented Jewish and Agnostic religions represented three (4.68%) and four (6.25%) respectively. No respondents represented the Presbyterian denomination while seven (10.93%) represented other than those on the questionnaire. 16 respondents failed to answer and therefore represent missing values. Table 6 demonstrates the distribution of respondents by religious affiliation.

TABLE 6

Description of Population by Religious Affiliation

Religious Affiliation	Frequency	Percent
Protestant	9	14.06
Roman Catholic	33	37.50
Anglican	9	14.06
United	8	12.50
Jewish	3	4.68
Agnostic	4	6.25
Presbyterian	0	0.00
Other	7	10.93
Total	64	100.00%

Note. N = 80; missing values = 16.

Description of Population by Number of Family Residents

As indicated in Table 7, 14 respondents (17.94%) had one other family member only presently residing at the respondent's home, 21 respondents (26.92%) had 2 other members, 16 (20.51%) had 3 others and 16 (20.51%) had four other members. Those with five, six and eight other family members in their home represented nine (11.53%), one (1.28%), and one (1.28%), respectively. The mean number of family members who resided at the respondent's home at the time of the study was 3.02.

TABLE 7

Description of Population by Number of Family Members At Home

Number of Family Residence	Frequency	Percent
1	14	17.94
2	21	26.92
3	16	20.51
4	16	20.51
5	9	11.35
6	1	1.28
8	1	1.28
Total	78	100.00%

Note. N = 80; M = 3.02; missing values = 2.

Description of Population by Additional Voluntary Involvement

Those respondents who were involved in programs supported by the United Way, other than United Way itself, numbered 34 (42.50%). Another 34 (42.50%) cited involvement in either ethnic groups or service groups, while 25 (31.25%) cited involvement with religious groups. Forty-six (57.50%) of the respondents cited voluntary involvement in groups or organizations other than those on the questionnaire. The analysis of alternative voluntary activity suggests three major groups: athletic organizations, work related organizations, and family oriented groups. Table 8 demonstrates the distribution of respondent's involvement in other voluntary activity.

TABLE 8

Description of Population by Additional Voluntary Activity

Group	Frequency	Percent
Programs Supported by the United Way	34	42.50
Ethnic or Service	34	42.50
Religious	25	31.25
Other	46	57.50
Total	159	173.75%

Note. N = 80; totals represent involvement in all additional forms of voluntary activity, hence totals exceed (N) and the 100.00% level.

RECRUITMENT

The following analysis is based on seven major areas which were considered relevant to the recruitment process (see Appendix "D", questions 1-7). The first research question (see p. 37) which established the basis for the investigation of these variables states:

Does the recruitment process for the Allocations committee membership used by the United Way of Windsor-Essex County provide an effective means of representing the community?

Length of United Way Involvement and Recruitment Method

As indicated in Table 9, those respondents who indicated that they were involved with the United Way for one year only represent 20 (25.31%), those with two to three years involvement represent 39 (49.37%), those with four to six years represent 13 (16.46%), those with seven to ten years involvement represent three (3.97%), and those with over ten years represent five (6.33%). The mean number of years in which respondents had been involved with the United Way of Windsor-Essex County was 3.47.

TABLE 9

Number of Years of United Way Involvement

Years of United Way Involvement	Frequency	Percent
1	20	25.31
2-3	39	49.37
4-6	13	16.46
7-10	3	3.79
10-20	5	6.33
Total	79	100.00%

Note. N = 80; \bar{M} = 3.47; missing value = 1.

Table 10 provides the distribution of the respondents' number of years of panel member experience by their latest year of involvement on the Allocations Committee.

Of those respondents whose latest involvement was during the 1983 review process, two (33.33%) had no previous experience, four (66.67%)

had one to two years' experience, and none had over three years' experience.

Of those respondents whose latest involvement was during the 1984 review process, six (25.00%) had no previous experience, nine (37.50%) had one to two years' experience, and nine (37.50%) had over three years' experience.

Of those respondents whose latest involvement was during the 1985 review process, 12 (24.00%) had no previous experience, 21 (42.00%) had one to two years' experience, and 17 (34.00%) had over three years' experience.

TABLE 10

Latest Year of P&B Involvement by Number of Years Of P&B Experience

Year	Experience	Frequency	Percent	Total
1983	0-1	2	2.50	7.50
	1-2	4	5.00	
	> 2	0	0.00	
1984	0-1	6	7.50	30.00
	1-2	9	11.25	
	> 2	9	11.25	
1985	0-1	12	15.00	62.50
	1-2	21	26.25	
	> 2	17	21.25	
Total		80	100.00%	100.00%

Recruitment Methods Experienced by Respondents

As indicated in Table 11, 10.00% (8) of the respondents reported their involvement with the Allocations Committee to be self initiated while 27.50% (22) reported that they were invited by United Way staff. Thirty-six respondents (45.00%) reported that they had been referred by another P&B review panel member or United Way volunteer, 15.00% (12) were referred by a United Way member agency, and 2.50% (2) became involved by means other than those designated on the questionnaire.

TABLE 11

Distribution of Recruitment Methods Experienced By Respondents

Recruitment Method	Frequency	Percent
Self initiated	8	10.00
Invited by United Way Staff	22	27.50
Referred by Other Panel Member or Volunteer	36	45.00
Referred by United Way Member Agency or Project	12	15.00
Other	2	2.50
Total	80	100.00%

Community Representation

Questions five and six of the questionnaire provided the researcher with information related to the degree that various community groups were represented as reported by the respondents in their latest review process. Table 12 identifies the representativeness of various group affiliations in the community by citing the relevant statistical measures that may be used to describe these various target populations. Due to the type of scales used to address these areas on the questionnaire [i.e. a score of (1) suggested low representation, a score of (3) suggested average representation, and a score of (5) suggested high representation] measures of both central tendency and dispersion were used.

TABLE 12

Statistical Comparison of Ratings on the Representation of Various Group Affiliations in the Community

Group Affiliation	Mean value	Std. Dev.	Median	Quartile Range	Mode	(N)
Ethnic	3.35	1.235	3	2.00	3	73
Economic Status	3.35	0.983	3	1.00	3	69
Occupational	3.79	0.786	4	1.00	4	72
Educational	3.65	0.980	4	1.00	4	72
Organized Labour	3.26	1.151	3	1.75	3	72
Seniors	2.84	1.395	3	2.00	2	76
Gender (Sex)	4.06	0.910	4	2.00	5	79

Table 13 identifies the degree to which respondents felt that knowledge of finance, community services and programs were considered necessary to perform effectively during the review process.

TABLE 13

Statistical Comparison of Ratings on the Degree to Which Knowledge Pertaining to Finance and Community Services and Programs were Considered necessary

Knowledge Areas	Mean Value	Std. Dev.	Median	Quartile Range	Mode	(N)
Financial	3.76	1.021	4	2	4	80
Community Services And Programs	3.98	0.940	4	2	4	79

ORIENTATION AND TRAINING

The following analysis was based on six major areas which were considered relevant to the orientation and training process. The second research question (see p. 37) which prompted this investigation was as follows:

Does the orientation and training process, used by the United Way of Windsor-Essex County, Allocations Committee provide sufficient time, instruction, and reference material for the volunteer panel members to prepare them for the review process?

Provision of information

Table 14 demonstrates the comparison of respondent's ratings on the provision of various areas of information needed to conduct a program and budget review. These ratings are based on the respondent's perception of the sufficiency of information provided to them during the orientation and training period. Ordinal scales were provided (see question #8 in Appendix "D") which allowed the respondents to select a score between 1 (insufficient) and 5 (sufficient).

It should be noted that although measures of central tendency and dispersion suggest that all areas of information were slightly above the midrange score of three, the size of percentages of respondents with scores equal to or less than three in some areas should be noted. In particular, 36 respondents (46.75%) scored the provision of information related to the basic process of budgeting and allocation equal to or less than the midpoint of three. Thirty-three respondents (43.42%) scored the provision of information related to the ramifications of recommendations on the member agencies equal to or less than the midpoint, and 29 (37.66%) scored the provision of information related to how responsibilities were to be carried out equal to or less than three.

TABLE 14

Comparison of Respondent's Ratings of Information Provided During Training

Information Provision	Mean Value	Std. Dev.	Median Value	(%) = ≤ 3	Mode	(N)
Nature and Purpose of Review Process	3.92	.823	4	29.87	4	77
Process to be Followed	3.98	.769	4	24.67	4	77
Budgeting and Allocation	3.49	1.034	4	46.75	4	77
Ramifications of Recommendations	3.55	1.051	4	43.42	4	76
How to Carry out Responsibilities	3.73	1.072	4	37.66	4	77

Helpfulness of Volunteer Manual

Table 15 provides a statistical comparison respondent's ratings of the helpfulness of the volunteer manual either as a reference tool or a learning tool, or both.

Respondents were requested to score the degree of helpfulness of the volunteer manual by selecting a descriptor on an ordinal scale (a score of one represented unhelpful, a score of three represented average helpfulness, and a score of 5 represented very helpful). Here again, as in Table 14, the measures of central tendency and dispersion suggested that both areas were above average. The size of percentages of respondents who scored these areas equal to or less than the midpoint of three should be noted as well.

In relation to the manual's helpfulness as a learning tool, the mean score was 3.85, however, 25 respondents (34.25%) scored its helpfulness in terms of learning at equal to or less than three. As to the manual's helpfulness as a reference tool, the mean score was 3.67, but, 30 respondents (39.47%) scored its helpfulness as a reference tool equal to or less than three.

TABLE 15

Statistical Comparison of Respondent's Ratings on the Degree of Helpfulness of the Volunteer Manual

Volunteer Manual Ability	Mean Value	Std. Dev.	Median	(%) = ≤ 3	Mode	(N)
Learning Tool	3.85	.937	4	34.24	4	73
Reference Tool	3.67	1.063	4	39.47	4	76

Provision of Reference Material and Information

Table 16 provides a statistical comparison of the respondent's ratings on the degree of sufficiency of reference material and information.

Although measures of central tendency and dispersion suggest that all areas of information were sufficient with all mean scores over the midpoint of three, the size of percentages of respondent's scores which were equal to or less than the midpoint of three might also be noted.

In terms of the provision of background material on member agencies, the mean score was 3.65, however, the percentage of

respondents which scored this area equal to or less than three was 37.50% (30) respondents. In terms of the provision of reference material on agency submissions, the mean score was 3.48, though the percentage of respondents which scored this area equal to or less than the midpoint was 46.83% (37). Finally, in terms of the provision of information and material on statistical and budgeting procedures, the mean score was 3.23. The percentage of respondents which scored this area equal to or less than the midpoint was a majority, 63.75% (51) respondents.

TABLE 16

Statistical Comparison of Respondent's Ratings on the Degree or Sufficiency of Reference Material and Information

Area of Information	Mean Value	Std. Dev.	Median	(%) = <3	Mode	(N)
Background Material on Member Agencies	3.65	.969	4	37.50	4	80
Reference Material on Agency Submissions	3.48	.958	4	46.83	4	79
Statistical and Budgeting Procedures	3.23	1.031	3	63.75	3	80

Satisfaction with Orientation Variables

As indicated in Table 17, 12 (15.19%) respondents would have preferred a longer orientation period while 84.81% (79) felt that the orientation period was of sufficient length (missing values = 1).

Twenty-six respondents (33.76%) would have preferred more guidance during orientation, while 51 (66.23%) felt that there was sufficient guidance. (missing values = 3)

Table 17 also indicates that 27.84% (22) would have preferred more instruction during orientation, while 72.15% (57) respondents felt the instruction was sufficient. (missing values = 1)

TABLE 17

Distribution of Respondent's Satisfaction With Guidance, Instruction and Length of Orientation Period

Orientation Concern	Satisfied	Frequency	Percent
Length of Orientation	no	12	15.19
	yes	67	84.81
Amount of Guidance	no	26	33.77
	yes	51	66.23
Amount of Instruction	no	22	27.85
	yes	57	72.15

Overall Ratings

Table 18 provides a statistical comparison of ratings on three interrelated variables which address the overall adequacy of the orientation period. Variable "Overall #1" identifies the ratings on an isolated question (#13 on the questionnaire), "Overall #2" identifies the scores from a combination of all ordinal type questions that are

considered relevant to the orientation period (# 8,10,11, and 13). The midpoint score for variable "Overall #2" was 39. Variable "Overall #3" identifies the rating of comparison between the respondent's latest review and (if applicable), any previous reviews in which the respondent has participated as identified by question 14 of the questionnaire (it should be noted that the total number of respondents (40) identifies those who have participated in more than one annual review).

The data in Table 18 indicate that although mean scores on all three variables are above the midpoints, the size of percentages of respondent's scores equal to or less than the midpoints might be noted, with 37.17% for "Overall #1", 27.50% for "Overall #2", and 42.50% for "Overall #3.

TABLE 18

Statistical and Descriptive Comparison of Ratings on Scores of the Overall Orientation Process

Variable	Mean Value	Std. Dev.	Median Value	Freq = <mid	(%) = <mid	Freq >mid	(%) >mid
Overall #1	3.74	0.999	4	21	37.17	49	62.82
Overall #2	44.2	9.638	45	22	27.50	58	72.50
Overall #3	3.65	1.001	4	17	42.50	23	57.50

Note. For variable "Overall #1", N = 78; for variable "Overall #2", N = 80; and for variable "Overall #3", N = 40.

Time Factor

Table 19 provides a statistical comparison of ratings on the provision of sufficient time needed to comprehend new material adequately during orientation, to review agency submissions in order to prepare questions during the pre-meeting, and to allow agencies to clarify issues raised by panels during the actual reviews.

Table 19 also provides the percentages of respondents scores which were equal to or less than the midpoints for each of the three variables. In terms of the time needed to comprehend new material during orientation and training, 41.55% had scores equal to or less than the midpoint value of three. In terms of the time needed to review agency submissions and prepare questions during the pre-meeting, 13.75% had scores equal to or less than the midpoint. Finally, in terms of the time needed to allow agencies to clarify issues raised by panels, 15.58% had scores equal to or less than the midpoint value.

TABLE 19

Statistical Comparison of Ratings on the Adequacy of Time Allowed to Adequately Accomplish Tasks at Various Stages of the Review Process

Time Factor	Mean Value	Std. Dev.	Median	(%) =<mid	Mode	(N)
To Comprehend New Material During Orientation	3.61	1.065	4	41.55	4	77
To Review Agency Submissions and Prepare Questions (Pre-Meeting)	4.23	1.058	5	13.75	5	80
To Allow Agencies to clarify issues raised by Panels (Reviews)	4.29	.875	5	15.58	5	77

THE REVIEW PROCESS

The following analysis is based on eight major areas which were considered relevant to the review process itself. The research question (#3, p. 37) which prompted this investigation states:

Does the program and budget review process used by the United Way of Windsor-Essex County provide an effective structure for evaluation of member agencies and programs?

As indicated in Table 20, 67.53% (52) respondents felt that there was sufficient written information about each agency prior to the review meeting, while 32.47% (25) respondents felt that they would have preferred more information.

Seventy-one respondents (89.87%) stated that they felt comfortable expressing their opinions and participating in agency reviews, while eight (10.13%) did not. Open-ended responses to this question (#17a on

questionnaire) provided the following explanations for the lack of comfort: (a) the process was too hurried and therefore some respondents withheld disagreements; (b) some respondents felt that they had insufficient information to be able to contribute to the discussion; and (c) several members felt that the chairperson's mind was already made up and any discussion was irrelevant.

Table 20 also indicates that 89.74% (70) respondents participated as much as they would have liked, while 10.26% (8) felt that they would have liked to participate more than they did. From a review of the questionnaires, it was noticed that four of the eight also expressed discomfort in expressing their opinions and the other four offered explanations similar to those above for their lack of participation.

TABLE 20

Distribution of Positive and Negative Responses to Variables Considered Relevant to the Preparation for and Conducting of Reviews

Variable	Response	Frequency	Percent
Sufficient Written on Agency Prior to Meeting with them	positive	52	67.53
	negative	25	32.46
Comfortability in Participating During Agency Reviews	positive	71	89.87
	negative	8	10.13
Participate as much as Preferred	positive	70	89.74
	negative	8	10.26

Staff Person

Table 21 provides a statistical comparison of ratings the performance of various duties assigned to the staff person.

Each variable (duty) was responded to by identifying a position on an ordinal type scale (1 represented poor performance, 3 represented average performance, and 5 represented excellent performance). As indicated in Table 21, mean values were above the midpoint scores for all variables.

TABLE 21

Statistical Comparison of Ratings on the Performance of Duties by Staff Person

Staff Duties	Mean Value	Std. Dev.	Median	Quartile Range	Mode	(N)
Provision of Background Information	4.00	1.057	4	2	5	78
Clarification of United Way Policy	4.15	0.898	4	1	4	78
Assistance with Problem Solving	4.04	1.018	4	1	5	77
Participation During Pre-Meetings	4.25	0.937	5	1	5	77
Participation During Post-Meetings	4.24	0.910	5	1	5	77
Provide Direction During Meetings	4.00	1.025	4	1.5	4	77

Chair Person

Table 22 provides a statistical comparison of ratings on the performance of duties by the chairperson.

Each variable (duty) was responded to by identifying a position on an ordinal type scale (1 represented poor performance, 3 represented average performance, and 5 represented excellent performance). As indicated in Table 22, mean values were above the midpoint scores for all variables.

TABLE 22

Statistical Comparison of Ratings on the Performance of Duties by the Chairperson

Chairperson's Duties	Mean Value	Std. Dev.	Median	Quartile Range	Mode	(N)
Encourage Group Participation	4.18	1.011	4	1	5	72
Helping During Problem Discussions	4.02	1.041	4	2	5	71
Maintaining Order During Meetings	4.12	1.033	4	1	5	72
Provide Guidance and Direction	4.00	1.034	4	2	5	72
Knowledge of Job and Member Agencies	3.97	1.034	4	2	5	72

Note. seven respondents cited their duties as chairpersons and therefore chose not to evaluate themselves (missing values = 3).

Post-Meeting Variables

Table 23 provides the distribution of respondents' positive or negative responses concerning variables related to the post-meeting segment of the review process.

Fifty-four respondents (67.50%) stated that they felt comfortable that all relevant material had been discussed, while 26 (32.50%) did not. Seventy-two respondents (92.30%) stated that they felt recommendations were formulated in a democratic manner, while six (7.69%) did not. Finally, 62 (77.50%) respondents stated that they felt the program and budget review process allowed them to make objective recommendations concerning agency request, while 18 (22.50%) did not.

TABLE 23

Distribution of Positive and Negative Responses Concerning Post-Meeting Variables

Post-Meeting Variable	Response	Frequency	Percent
Relevant Material Discussed and Clarified	positive	54	67.50
	negative	26	32.50
Recommendations Formulated In Democratic Manner	positive	72	92.30
	negative	6	7.70
Process Provided Objective Recommendations	positive	62	77.50
	negative	18	22.50

Analysis of Scores on the Overall Review Process

In an attempt to analyze the respondent's satisfaction with the overall program and budget review process, the sum of the midpoints from all ordinal scales have been combined with the midpoint score from the summation of all nominal scales (yes responses = 1, no responses = 0). The midpoint score of the total summation = 109.5.

The rationale for creating and analyzing this variable was to establish the satisfaction of the total program and budget review process by using an exhaustive variable, not a combination of mutually exclusive variables.

Table 24 provides a statistical comparison of overall ratings of the review process, as well as a comparison of ratings by year, and by method by which the questionnaire was received. For the purpose of this analysis, those respondents from both 1983 and 1984 were combined to represent the group "Past" (N = 30), while those respondents from the 1985 review represent the group "present" (N = 50).

The rationale for collapsing the 1983 and 1984 was to create two variables with sufficient raw data to be able to compare changes in satisfaction over a specified time period.

From those respondents of the "Present" group, 31 (64.00%) respondents were administered their questionnaires by representatives of the United Way of Windsor-Essex County, while 19 (36.00%) respondents received their questionnaires through the mail. A "two-tailed test" was conducted in an attempt to compare the differences between the mean scores of these two groups. This test indicated that the difference between the two groups was not statistically significant with $t(48) =$

1.1515 at $p < .05$. This was further verified by comparison to the percentage of respondent's scores which were equal to or less than the midpoint value.

TABLE 24

Statistical Comparison of Ratings on the Overall Scores of the Program and Budget Review Process by Respondents

Group	How Received	Mean Value	Std.Dev.	Median Value	Percent = \leq Mid.	Percent > $>$ Mid.	(N)
Present & Past	Mailed & Admin.	98.45	15.97	100	71.25	28.75	80
Past	Mail	94.33	13.61		75.00	25.00	30
Present	Mail	98.05	15.44		68.42	31.58	19
	Admin.	102.67	17.74		61.29	38.71	31

Note. $t_{(48)} = 1.1515$ at $p < .05$.

This chapter has provided an analysis of the data received from the questionnaires. Sections and tables have been organized in relation to research questions cited in Chapter 4.

The following chapter will provide the discussion of the findings, recommendations, and conclusions of this study.

Chapter VI

DISCUSSION OF FINDINGS AND RECOMMENDATIONS

Chapter five provided the reader with an analysis of the data derived from the collection process. The findings that were drawn from this analysis will be discussed in this concluding chapter with attention given to their relevance to the research questions. Recommendations will be made at the conclusion of each section.

DEMOGRAPHIC CHARACTERISTICS

In reviewing the findings associated with the demographic characteristics of the population used in this study, a profile of a "typical" Allocations Committee member can be drawn. This member could be either male or female, most likely between 36 and 45 years of age, likely to be married, and a good chance to be of the Roman Catholic religion and with about three family members residing in the member's home. This member, as well as the respective spouse would most often have either a professional or semi-professional career and in most instances be involved in additional voluntary services.

Occupation

The finding that over two-thirds of the population were either professionals or semi-professionals would suggest that the Allocations Committee's major recruitment is from these populations.

This percentage of 66.67%, when compared to the percentage of professionals and semi-professionals in the Essex County population, (33.96%) is disproportionately large (Statistics Canada, 1981).

It should be stressed that the remaining one-third of the population represented all other forms of employment or unemployment. In particular, the fact that less than eight percent of the population were retired, and less than two percent were unemployed, would suggest that the Committee membership was less than representative of the community in terms of these occupational categories, since Essex County's retired population stood at 34,520 (11.05%) and the number of unemployed totalled 32,180 (10.29%) at the conclusion of the 1981 census (Statistics Canada, 1981).

Age

While three-quarters of the population were well distributed within the twenty-five to fifty-five year age bracket, a very low number of committee members (approx. 6%) were drawn from combined extreme upper and lower ends of the age categories in comparison to the combined total populations of both youth under 24, and aged over 65 (29.52%). It might be important to recruit more members from these age groups since, as stated by Carter (1975) "Teenagers and retired people are the two most sought after groups" in terms of voluntary organization recruitment practices. These two target groups can provide high levels of energy, new and creative ideas, and dependability to the organization.

Religious Affiliation

The finding that thirty-three of the sixty-four (37.50%) who responded to their religious affiliation were Roman Catholic, compared to 26 (40.63%) from Anglican, Protestant, and United denominations would suggest that, in relation to the total number of respondents in this study, religious groups appeared to have appropriate representation.

Gender

It is positive to note that of the eighty respondents who participated in this study, both males and females were equally represented (52.5% & 47.5%) in relation to the percentages from the total population of Essex County (49% & 51%).

Marital Status

In relation to the population of Essex County, the representation by respondents in terms of their marital status, would appear to be slightly disproportionate. The data would suggest this to be particularly true in the case of singles, and separated respondents. In light of the number of single persons fifteen years and over (61,380 or 18.47%) that was reported by Statistics Canada in 1981, combined with the growing number of separated persons (2.16%), it might be beneficial to recruit more members from these groups.

Recommendations in Relation to Demographic Data

In relation to the demographic characteristics cited in this section, these findings would indicate that:

1. If the United Way wishes a more proportionate representation in relation to Allocations Committee membership, consultation with Statistics Canada figures might be appropriate with respect to age, occupation, marital status, and religious affiliation.

RECRUITMENT

With a mean number of years of overall United Way involvement of 3.47 and over 95% of the population having between one and six years of overall involvement, the United Way recruitment methods appear to be relatively successful in retaining members on the review panels. This might also indicate two important factors: that the United Way is relatively successful in terms of bringing in dedicated members and that present members receive high gratification from their voluntary experiences. Carter (1975) suggests that those who gain from voluntary experience tend to remain in their volunteer positions longer than if they don't gain from the experience. On the other hand, Carter suggests that from the agencies which participated in her study, the majority of volunteers remained in service at an individual agency for approximately 1-4 years.

It was also of interest to notice that only 7.5% of the respondents who participated in this study were from the 1983 review, 30.0% were from the 1984 review, and 62.5% were from the 1985 review. This might indicate that the number of new members who participate in the review process is growing substantially. If this is the case, what is implied

when a substantial number of first year members comprise each of the review panels? Are these members unduly influenced by the more experienced chairpersons or staffpersons? If so, is this what several respondents were suggesting when they stated "It felt as though the chairperson had already made up his mind"?

Recruitment Methods

The finding that almost three-quarters of the population were either invited by United Way personnel or referred by other panel members or volunteers, might suggest that: a) volunteers gain high levels of satisfaction from the process and feel comfortable suggesting involvement possibilities to friends; b) this form of recruitment is preferred by the organization to ensure that only selective "potential" volunteers are introduced to the Allocations Committee. It was also of interest to note that only 15% of the respondents were referred by United Way member agencies, while 72% were referred or invited by United Way staff or volunteers. This might imply that agencies have little investment in securing representation on review panels, or that member agencies do not know that they might suggest or recommend persons for the agency review panels.

Representativeness of Community Groups and Knowledge Required

In relation to the degree of representativeness of community groups, the finding that scores (pertaining to all areas) were either centered at the midpoint score of 3, or slightly above at 4, would suggest that in the opinion of the respondents, all areas of the community were

represented. These scores however, when compared to mean scores, standard deviations, and the percentage of respondents who scored the various group affiliations equal to, or less than the midpoint values on the scales, provide a slightly different perspective.

Community groups related to ethnic populations, socio-economic levels, occupational levels, and seniors all appeared to be less represented than is preferred as outlined in the United Way mission statement (United Way of Windsor-Essex County, 1985). Over 60% of the scores fell equal to or less than the midpoint score of 3, in relation to representation by ethnic groups, which would indicate that this group was less represented than the preferred ratio (United Way, 1985). This was also the case with economic representation, with over 55% equal to or less than preferred (United Way, 1985). Groups such as labourers and seniors were substantially less represented, with approximately 60% and 65% respectively that were scored by respondents at either equal to, or less than the midpoint value.

These findings would suggest that in the opinion of the respondents, over one-half of the community groups identified in this study were under represented in relation to the total population. In terms of the levels of working knowledge in relation to financial expertise and community services, both areas appear to be well represented as expressed by medians of 4 and little variation between median scores and arithmetic means.

Summary of Recruitment Findings and Recommendations

The findings presented in this section are related to the first research question cited in Chapter 4. This question states:

Does the recruitment process for the Allocations Committee membership provide an effective means of utilizing as close a representation of the community?

Although the organization's apparent increase of voluntary members might provide the review process with a high percentage of new volunteers, representativeness of committee membership compared to the overall population of Essex County (Statistics Canada, 1981), might be of concern to the United Way, based upon its present mission statement. It might also be of concern to this organization, in relation to its mission statement, that the present methods of recruitment utilized may perpetuate the present lack of proportionate representation.

In light of these findings, the response to the previously cited research question would be negative. The recruitment process utilized by the United Way of Windsor-Essex County for the Allocations Committee membership is less effective than it might be in securing as close a representation of the community as possible. As a result, the following recommendations are respectfully submitted:

1. That the United Way of Windsor-Essex review the relationship between its mission statement and the actual needs of the organization in terms of volunteer involvement in the Allocations process. If it is decided that proportionate community representation is a vital factor of the review process, the organization should explore alternative methods of recruitment.
2. If the United Way is concerned about ensuring representation by seniors and youth, recruitment personnel should expend more energy towards identifying techniques for locating and securing members from these age groups.

ORIENTATION AND TRAINING

Due to the nature of the program and budget review process, the provision of information during the orientation or training segment of the process appears to be a vital factor in its success or failure. The finding that all areas of information, considered pertinent to a successful review, were provided to volunteers might suggest that the organization has a good understanding of the kind of information desired by the members for conducting agency reviews.

Open-ended responses, provided by the respondents which suggested additional information that would be considered helpful was as follows:

1. Previous recommendations offered to the member agencies by committee, and steps that were taken to adopt or disregard these recommendations;
2. Member agency policy manual and goal statements;
3. Easily understood charts of longitudinal budget and relevant statistics of member agencies.

In terms of the program and budget review manual, median scores of four and little variation between median and mean values suggest that a significant majority of the respondents felt that the manual was adequate both as a learning tool and as a reference.

Reference Material

Although median scores of three or four were achieved in relation to respondents' ratings, on the degree of sufficiency of all reference material, the variation between median and mean scores combined with open-ended responses, would suggest that certain areas of reference were considered insufficient. Primarily, the areas of statistical and budgeting procedures were cited as being insufficient by a large

majority of the respondents. Other areas of insufficiency were cited above as: the member agency's previous review recommendations, member agency policy manuals, and clear, understandable, longitudinal budget charts and statistics.

Overall Satisfaction with Orientation Process

Overall, the orientation process was considered by the respondents to be "adequate" to "above adequate" in preparing citizens to conduct program and budget reviews. The majority of the respondents responded to overall satisfaction in the third and fourth quartiles in all but one area, that being, the comparison between latest and previous reviews which was slightly lower. This finding however was still represented by the majority and was located at the midpoint score of three.

It might also be considered that due to the number of "new" members who participated in the review process, respondents knew so little about the agencies and the review process, that any information received was perceived by respondents to be satisfactory.

Related to overall satisfaction with the orientation process is the amount of time allowed to comprehend material and information during this period. Findings would suggest that sufficient time was provided. This finding however, might be considered questionable since notable variation between median and mean scores exists.

Summary of Orientation and Training Findings and Recommendations

The findings provided in this section are related to the second research question cited in Chapter four. This question states:

Does the orientation and training process, used by the United Way of Windsor-Essex County, Allocations Committee provide sufficient time, instruction, and reference material for the volunteer panel members to prepare them for the review process?

In relation to this question, it is difficult to conclude whether the provision of time, instruction, and reference material was sufficient or not. In terms of the data provided by respondents, it would appear to be sufficient, however, it might be noted that there is no basis for comparison of these particular factors with the other alternative forms of instruction, time allotments, and provision of reference material.

In particular, the provision of reference material, as suggested by respondents, could be enhanced by including some additional material as suggested in this section.

It should also be noted that due to a rather skewed sample, in terms of academic and professional expertise, changes made in the recruitment process may dramatically affect the quality and quantity of reference material, time, and information required.

In light of these findings, the following recommendation is respectfully submitted.

1. It is recommended that if the United Way of Windsor-Essex County is concerned about providing an effective orientation and training process, this organization must first consider the relationship between possible changes made in recruitment practices and training variables, and then explore the various alternative methods of training and alternative time sequences available.
2. It is also recommended that the program and budget review manual be expanded to include reference material detailed.

THE AGENCY REVIEWS

Almost all areas of investigation concerning the actual agency reviews, were given above average ratings by the respondents. It would appear that the present process, utilized for member agency reviews, provides volunteer panel members with: (a) an opportunity to participate as much as they preferred, and (b) a forum in which recommendations can be formulated democratically.

It is however, questionable, whether the present review process structure enhances the formulation of objective recommendations concerning agency allocations. This question is based upon the fact that, although the majority of respondents perceived all areas of the review process structure to be "adequate" or "sufficient", a number of areas of concern were identified by respondents in relation to the review process structure.

Two areas that were noted to be of concern, addressed the availability of sufficient written information on member agencies, prior to meeting with them, and the fact that all relevant material was not discussed and clarified before recommendations were made. In both cases, approximately one-third of the respondents were dissatisfied with these two areas.

In consulting open-ended responses which addressed these areas, the following trends were noted.

1. Many respondents felt that the time allotted to conduct agency interviews, and to fully discuss findings before recommendations were formulated, was inadequate.
2. Information submitted from agencies failed to provide respondents with adequate understanding of agency purpose, programme, and previous United Way recommendations.

3. There was no way of knowing what degree of need existed in the community for the agencies' services and to what degree services were duplicated by similar agencies.

Staff Member Performance

The performance of staff persons throughout the review process received high regard from the respondents. Both median and mean scores were located in the third and fourth quartiles. The lowest scores given to staff were in relation to providing direction during meetings, which, by protocol, was the primary responsibility of the panel chairperson.

Panel Chairperson Performance

The performance of chairpersons throughout the review process also received high regard from the respondents. Median and mean scores were located in the third and fourth quartiles, as well.

One area of concern noted from this inquiry, was related to the chairperson's overall knowledge of the job and of the member agencies. With a median score of four and a mean score of 3.97 and approximately thirty percent of the population rating the performance of this particular duty equal to or less than the midpoint score of three, the indication would be that chairpersons are not as knowledgeable of agencies or of the review process as they are expected to be. Perhaps more training might alleviate this matter.

Since, as cited in the section above, the chairpersons are fulfilling the role of providing direction and guidance as identified in the Program and Budget Review Manual (1982), the question might be raised, to what degree does the chairperson direct the flow and context

of the review meetings in terms of: (a) what material is discussed, (b) how controversial issues are resolved, (c) are decisions based on consensus or more towards an autocratic fashion, and (d) what depth and range of discussion are covered in relation to the chairperson's knowledge base.

Scores of the Overall Review Process

As stated in Chapter five, three different groups were identified within the population, in terms of the years in which they participated in the review process. The first group identified by "past & present" represents the total respondents of the study from all three years. This group's overall scores suggest the overall agency review process to be slightly less than adequate, with a median score of 100, a mean score of 98.45, and the percentage of respondents (71.25%) who scored the process equal to or less than the midpoint score of 109.5.

The second group cited are the respondents (30) who participated from both 1983 and 1984 (group identification = "past"). This group's overall scores again suggest that the agency review process is slightly below adequate, with a mean of 94.33, and the percentage of respondents (75.00%) who scored the process equal to or less than the midpoint of 109.5.

The third group cited combines all respondents from the 1985 review process. These respondents were divided into two groups: (a) those who received the questionnaire by mail, and (b) those who were administered the questionnaire by United Way staff. Since the two-tailed t-test indicated no significant statistical differences between the scores of

these two groups, they have been collapsed into the group represented by "present".

The scores from this "present" group of 50 review process members also indicated that the process was slightly inadequate with a mean score of 100.34, and a percentage of respondents (64.85%) who scored the process equal to or less than the midpoint value of 109.5.

Although these scores are unable to identify any actual areas which were considered by respondents to be "inadequate" or "insufficient", they do provide an indication of the need for further investigation of possible modifications which might benefit this process.

Summary of Review Process Structure Findings and Recommendations

Findings discussed in this section are related to the third research question cited in chapter 4. This question states:

Does the program and budget review process used by the United Way of Windsor-Essex County provide an effective structure for evaluation of member agencies and programs?

The response to this question is inconclusive. Although the findings which derived from measures of central tendency and dispersion might suggest that respondents considered the present review process structure is effective, these findings do not indicate that this organization is providing the "most" effective structure for evaluation of member agencies and programs, since there is no criterion for comparison.

The findings indicate that a large percentage of the respondents had concerns with the review process structure in the areas of information intake, and effective discussion. These two factors might be considered the basis for effective decision making and since a

relatively large percentage of the population was concerned with the adequacy of these two areas, the following recommendations are respectfully submitted:

1. Steps should be taken to request additional information, which has been identified as essential to effective decision making, from member agencies prior to Committee-agency presentations, such as: (a) more comprehensive information to help establish adequate understanding of agencies' purposes, programmes, previous panel recommendations, and, as cited on page 81, a longitudinal perspective, both graphic and descriptive, of budgets and other statistical data; and (b) some indication of the degree of the community need in relation to the various services provided by agencies.
2. Steps should also be taken to restructure the agency presentation and post-meeting discussion times to ensure that panel members have time to discuss all pertinent material before recommendations are made.

It might also be of interest for the United Way to review the role of the chairperson in the review process, as outlined in the United Way's Program and Budget Review Manual, 1982. Particular attention might be given to the amount, and nature, of direction provided to panel members during the actual agency reviews.

In terms of the overall program and budget review process, the below average scores and specific criticisms made by respondents on the questionnaires would suggest that changes should be considered.

Suggestions for Future Research

In an attempt to provide a progressive response to the findings of this investigation, the researcher respectfully submits the following recommendations for further research:

1. It would be of benefit to explore attitudes among various target populations within the Windsor community concerning their

interests, inhibitions, and attitudes towards actively participating on a citizens' review committee.

A study of this nature would provide an understanding of the changes that need to be made in the areas of recruitment, orientation and training, and structural processes.

2. It might be of interest to explore the kind of volunteer needed to conduct effective program and budget reviews. In particular, variables such as: the areas of knowledge and skill that are needed; the relationship between "cross-sectional recruitment" and the quality and quantity of training required; and, the alternative forms of review process structures that may enhance more effective decision-making.
3. The opening statement of the United Way of Windsor-Essex County's purpose states that the: "United Way's overall purpose is to meet existing and emerging community needs in Windsor and Essex County". It would appear impossible to be "accountable" to the community without an objective means of establishing or judging what the particular needs of the community are. Needs research therefore is urgent, if the United Way wishes to fill its full mandate of accountability to the community.

If this rationale is considered accurate, it would seem imperative for this organization to investigate the actual "needs of the community" and incorporate an understanding these needs into the Allocations Committee's review process.

Conclusions

This study has identified many positive aspects and some areas which might be improved in regard to the program and budget review process. These concerns lie primarily in areas of recruitment, and the actual agency review structure. It would appear however, that the United Way of Windsor-Essex County has demonstrated genuine concern for its accountability to the general public, and with this attitude, should continue to improve in this area in the future.

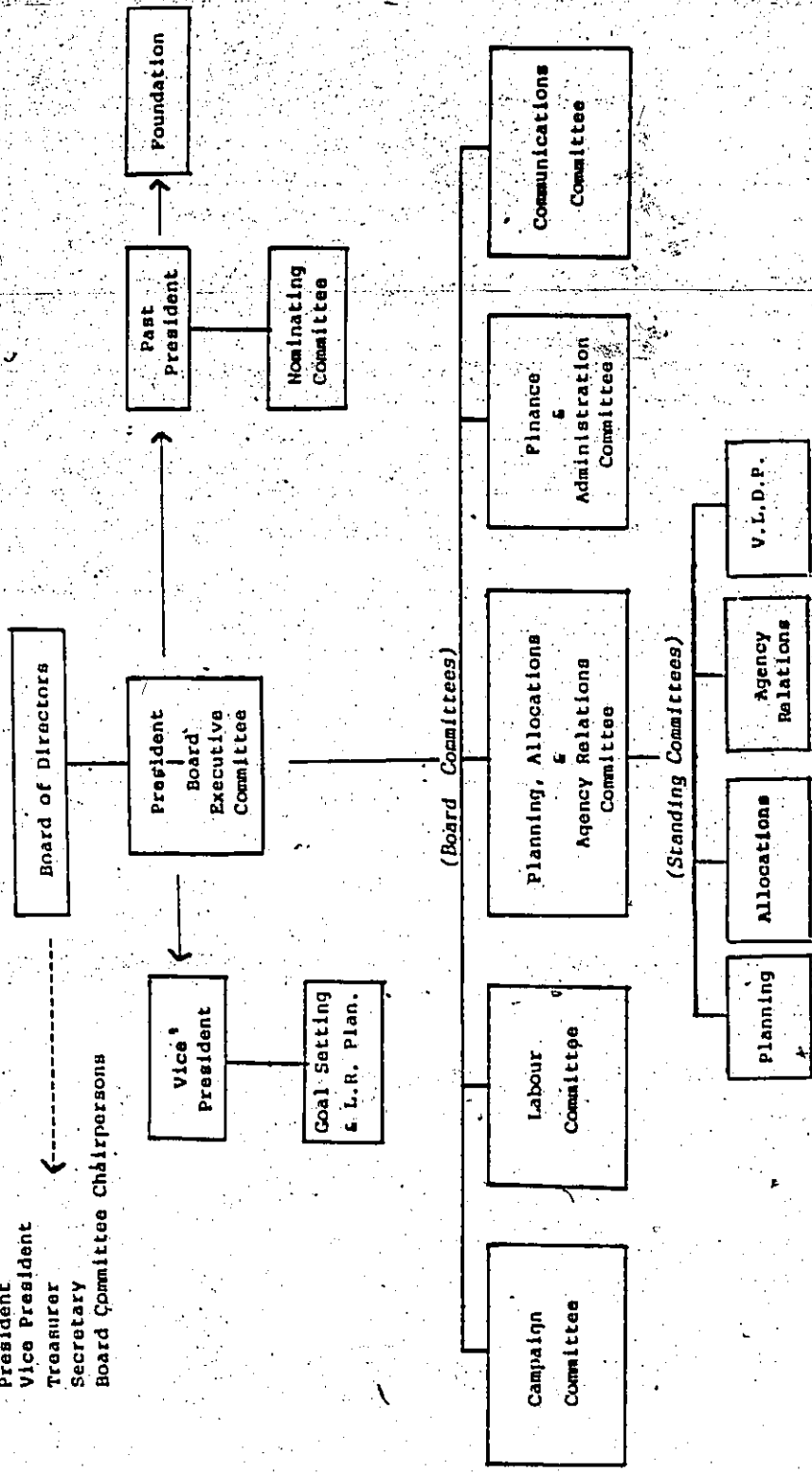
Appendix A

Organizational Chart of United Way Board of Directors

UNITED WAY OF WINDSOR-ESSEX COUNTY - BOARD OF DIRECTORS AND COMMITTEES

OFFICERS

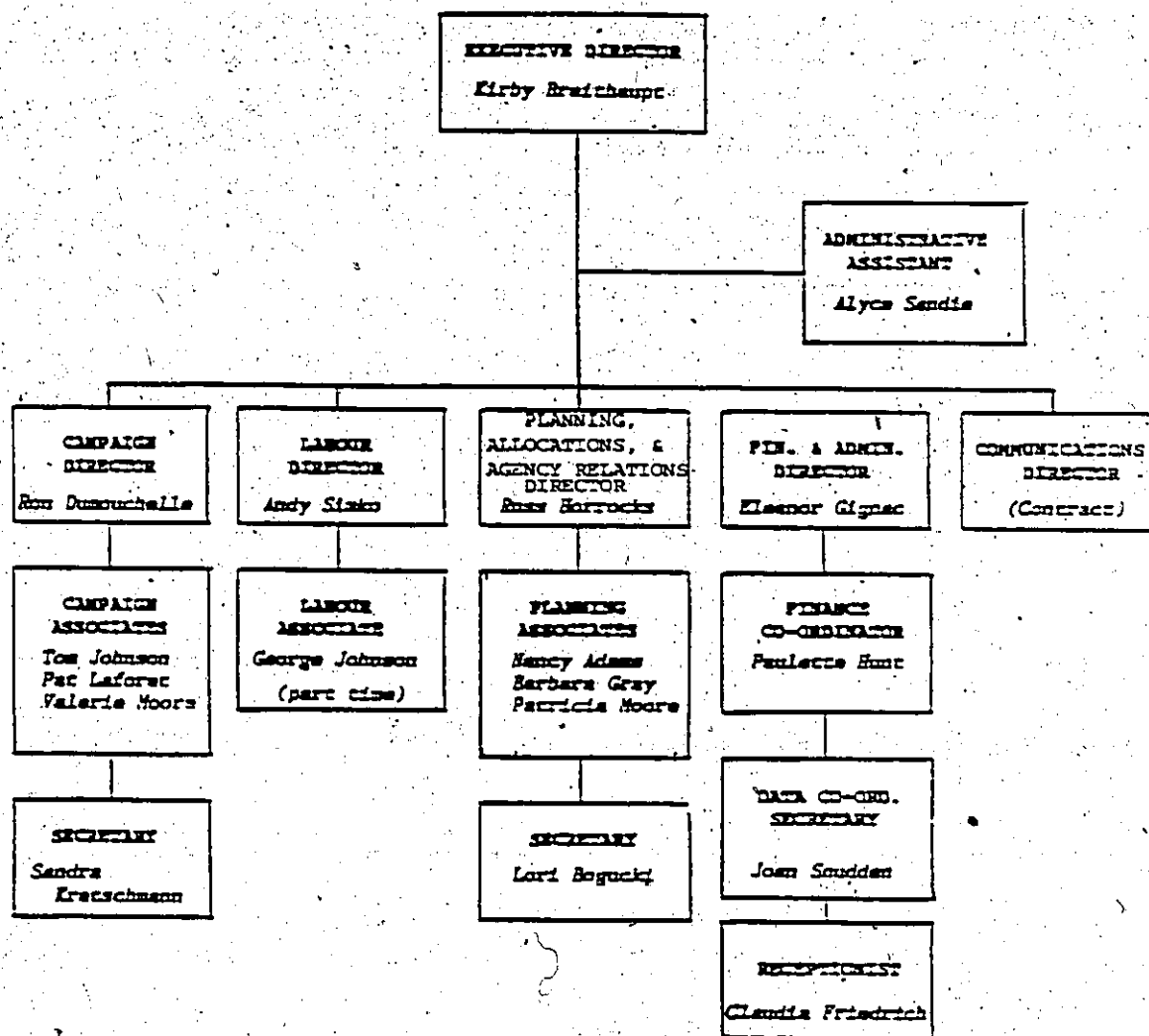
President
Vice President
Treasurer
Secretary
Board Committee Chairpersons



Appendix B

Organizational Chart of United Way Staff Utilization

UNITED WAY STAFF ORGANIZATION CHART



Appendix C

Questionnaire Cover Letter

Appendix D

Data Collection Instrument

PROGRAM AND BUDGET REVIEW COMMITTEE EVALUATION

GENERAL INFORMATION:

The information requested under this section will be used to describe the population of P&B volunteers.

sex [M] [F] Chairperson []

Panel Member []

Marital Status:

[married] [single] [divorced] [separated] [widowed] [co-habit]

Age [18-24] [25-35] [36-45] [46-55] [56-65] [66-over]

Religious affiliation _____

Occupation _____ Spouse's Occupation _____

Please indicate the number of family members presently living at your residence. []

Are you presently involved with other voluntary organizations?

a) United Way programs [yes] [no]
(other than United Way itself)

b) Ethnic or Service Group [yes] [no]

c) Religious Organizations [yes] [no]

Other _____

Recruitment

1. Number of years as a United Way volunteer []

2. Latest year of membership on P&B panel [85] [84] [83]

3. If you have been involved as a P&B panel member in previous years, please indicate by circling the respective years.

[84] [83] [82] [81]

4. How did you become involved with the P&B Review Panel?

- ☐ Self initiated
- ☐ Invited by United Way staff
- ☐ Referred by another P&B Review Panel member or other United Way volunteer
- ☐ Referred by a United Way member agency or special project
- ☐ Other (please specify) _____

5. In your opinion, to what degree was a cross section of the community reflected in the last P&B panel you participated in? (please indicate by circling the appropriate number on the scales)

	well represented			poorly represented		
a) Ethnic	5	4	3	2	1	
b) Economic status	5	4	3	2	1	
c) Occupational	5	4	3	2	1	
d) Educational	5	4	3	2	1	
e) Organized labour	5	4	3	2	1	
f) Seniors	5	4	3	2	1	
g) Gender (Sex)	5	4	3	2	1	

6. To what extent did your panel represent working knowledge in the following areas?

	well represented			poorly represented		
a) Financial expertise	5	4	3	2	1	
c) Community services and programs	5	4	3	2	1	

7. Did you think that there were any areas or groups that were not well represented on the most recent P&B panel you participated in?

Orientation and Training

8. Did the orientation and training session provide you with enough information to understand:

a) The nature and purpose of the Program & Budget Review Process?

sufficient information

insufficient information

5 4 3 2 1

b) The process to be followed while conducting agency reviews?

sufficient information

insufficient information

5 4 3 2 1

c) The basic process of budgeting and allocation?

sufficient information

insufficient information

5 4 3 2 1

d) The ramifications of panel recommendations on member agencies?

sufficient information

insufficient information

5 4 3 2 1

e) How to carry out your responsibilities?

sufficient information

insufficient information

5 4 3 2 1

9. Did the orientation and training session provide sufficient time for you to comprehend the new material adequately?

sufficient time

insufficient time

5 4 3 2 1

10. Was the Volunteer Manual helpful as:

helpful

unhelpful

a) A learning tool 5 4 3 2 1

b) A reference tool 5 4 3 2 1

11. Did you think that there was sufficient reference information concerning:

a) Background material on member agencies

sufficient information

insufficient information

5 4 3 2 1

b) Reference material on agency submission forms

sufficient information

insufficient information

5 4 3 2 1

c) statistical and budgeting procedures

sufficient information

insufficient information

5 4 3 2 1

d) Please list any information not mentioned that you would find helpful:

12. Would you have preferred:

yes no

a) A longer orientation period ☐ ☐

b) More instruction ☐ ☐

c) More guidance ☐ ☐

d) Other ☐

13. Overall I would rate my most recent P&B orientation and training session:

adequate

inadequate

5 4 3 2 1

14. (IF APPLICABLE) Compared to previous P&B review processes, I would rate this year's orientation and training session in preparing me to conduct my services as:

better

worse

5 4 3 2 1

Review Process

15. Were you given ample time to review the agency submissions in order to prepare questions during the pre-meeting?

sufficient time

insufficient time

5 4 3 2 1

16. Did you have sufficient written information about each agency prior to your meeting with them?

Yes ☐ No ☐

17. Did you feel comfortable expressing your opinion and participating in agency reviews?

Yes ☐ No ☐

- 17(a) If no, Why? _____

18. Did you participate as much as you would have liked?

Yes ☐ No ☐

Comments: _____

19. How would you rate the performance of the staff person assigned to you in the following areas:

	Excellent					Poor
a) Provision of background information	5	4	3	2	1	
b) Clarification of United Way policy	5	4	3	2	1	
c) Assistance with problem solving	5	4	3	2	1	
d) Participation during pre-meetings	5	4	3	2	1	
d) Participation during post-meetings	5	4	3	2	1	
e) Providing direction during meetings	5	4	3	2	1	

20. In your opinion, were the agencies allowed sufficient time to clarify issues raised by the panel?

sufficient time

insufficient time

5 4 3 2 1

21. Upon conclusion of the agency presentation did you feel comfortable that all relevant material had been discussed and clarified?

Yes ☐ No ☐

22. Were recommendations formulated in a democratic manner?

Yes ☐ No ☐

Comments _____

23. In your opinion, did the program and budget review process allow you to make objective recommendations concerning agency requests?

Yes ☐ No ☐

24. If your response was "No" please indicate what changes could be made to improve this process:

25. How do you rate the performance of the panel chairperson in the following areas:

	Excellent					Poor
a) Encouraging group participation	5	4	3	2	1	
b) Helping during problematic discussions	5	4	3	2	1	
c) Maintaining order during meetings	5	4	3	2	1	
d) Providing guidance and direction	5	4	3	2	1	
e) Knowledge of the job and the agencies	5	4	3	2	1	

Thank you for your participation in this survey, I would appreciate any additional comments that you wish to make.

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VITA AUCTORIS

Thom Morris was born in Windsor in 1955 and received his primary and secondary school education there.

In 1974 he began a career in photography with an apprenticeship with a local photographer and received formal training at the University of Mississippi.

After six years in this field, he returned to University of Windsor where in 1984 he received a B.S.W. degree. Within his final two years of undergraduate work, he was employed as a counsellor at the Glengarda Residential Center in Windsor.

For the past year, 1984-1985, he was enrolled in the Master of Social Work program, at the University of Windsor, with a concentration in administration.

He will graduate and receive a M.S.W. degree at the October, 1985, convocation.